

Qualification: CIPD Diploma in Applied Human Resources

5AMOC - Contributing to the Management of Change

Word Count: 2449

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: 05/12/2019

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

Overview

In my role within the organisation, I regularly make small changes to own personal work processes, letters etc. but this project was one of first that I had undertaken as one of the lead project officers to implement a change that would influence all staff members. The change identified was creating an online electronic absence system for all employees (E001).

Identifying change

Currently, the absence system for recording leave, medical appointments and Time off in Lieu, were being recorded on a paper form, signed by a line manager and passed to myself for copy and record on an Outlook Year Planner. The review of the absence system had been included within the Corporate Resources department operational plan to be actioned within 2018/19 by the HR department. The reasoning for including this change had been discussed by the Director of Corporate Resources, Corporate Resources Manager and myself due to concerns raised by employees and best practice (E002). These concerns and external factors had been developed into a SWOT analysis (E003). It was an intentional change but the main concern from this was the efficiency of the system, time spent by staff members from beginning to end and advancements in technology within other organisations (Taylor and Wilkinson 2016).

A GANTT chart had been devised to seamlessly devised to allow the system to be implemented and gone live within 6 months (E004). The chart had been split into three sections (Plan, Implement and Monitor) to ensure that each part of the project had been completed prior to moving on.

Objectives and Benefit of Change

The objectives of the system was to be accessible from any device at any time of the day, which could be calculated in hours and run from an employee's birthday month for a period of 12 months (E001) The association had identified where they were above and stated where they would like to be in the future (Austin 2015). It would benefit the organisation as the data would be instantly available online and would free the resources of the HR department to concentrate on other priorities within the departmental operational plan (E002).

With this information in mind, the technicalities of this was discussed with the ICT & Procurement Manager against two companies that had been approached to deliver the system. Discussions were held with this department to ensure that the system could be incorporated in line with our ICT security policy and data protection regulations (E002).

Following conference calls with both companies, it was agreed by the Director of Corporate Resources that the best system for the company would be Cascade GO (E005).

Previous Change initiative

Every year, the Association conduct an all Staff Business Planning Away day to gather feedback and suggestions for implementation into their 5-year business plan. The business plan is developed each year to meet the future strategic decision and is an important part in allowing an organisation to strive and grow against external and internal factors (Wilkinson and Taylor 2016). When conducting these sessions, post-training forms were completed to gather information on how they could be improved. Employees were very pleased with the ability to share their thoughts and could see that they were listened to by seeing their contribution within the final business plan report.

From this example received from previous change initiatives, it was clear that allowing employee voice was a positive part of the process and ensuring that they were informed to the final part (E006).

Key Stakeholders and Communication Requirements

Therefore, the key stakeholders which would be involved and affected by the change would be all staff members employed by the Association with a communications plan used to understand their needs (Austin 2015). The other key stakeholders to the Association are board members, contractors and residents but this change would not affect them. More specifically, members of the Corporate Resources department would be kept communicated at an earlier stage through a team meetings that they had been chosen as the team to trial the system prior to its launch (E007). All staff members, including line managers would be kept informed of the progress of the change initiative through the staff portal. The portal is accessible by all and can be viewed on each device (E008).

Deciding on Resources

To ensure that the system provided value for money and met the objectives set above, consideration was given to the cost in comparison to time spent by the HR department in administering the current absence system. The initial cost to set up the system was £600.00, followed by monthly payments of £168 for 40 users. By calculating the number of hours spent each week by employees against the cost of the system, there would be a saving of 31% to the organisation after the initial cost (E005). The main resource would be time to prepare and maintain the system to be put aside by the HR department to input all current leave data for each employee along with their recruitment information i.e. start date, line manager, department, next of kin etc. A dedicated support officer had been appointed by Cascade GO to provide a detailed overview of the system and to answer any queries that had arisen during the inputting stage (E009). Luckily to the organisation, Cascade GO could be accessed through work computers and personal devices and didn't need to invest in updated technology.

The Association is considered an employee that takes into consideration the training skills of each staff member and will develop their skills which is reflected by having a higher ability to adjust to change (Acas 2014). During the development of the change plan, management and corporate resources worked collaboratively to identify the training required to meet the employee and organisation needs (McNally 2019).

2. Be able to implement a change plan

As managing a project was a new area for myself, it was inevitable that I required support and guidance to ensure that the change is implemented seamlessly. Each step of the change process had been devised within the change plan and a timeline of events added to the Gantt chart (E004). By using the chart as a change management tool, it allows me to ensure that the objectives of our change were continued to be met by monitoring the completion of activities i.e. continued communications plan, including employee voice (Gifford 2018). Even though I had a chart to follow, I had the support of my line manager and Director of Corporate Resources to answer my queries and provide information on previous successful change initiatives to expand my project management skills.

Communication continued to be high on my agenda for employees and line managers. The implementation of the change was beginning to develop with all employee data being inputted into the system and the next step being to trial it with the Corporate Resources department staff. This information continued to be shared with employees through the Staff Portal with the option to share their concerns with myself by adding my email address (E010). At this moment, employees didn't have a contribution to the development of the system as this was generically built by Cascade GO and used by many other companies. Employees were only kept updated with the progress of its implementation against the GANTT chart. By this point, all employees were aware of the change initiative, its benefits and were happy to see its progression which increases their resilience towards its success (Taylor and Wilkinson 2016).

When reviewing the change model theories used to manage the change, it is apparent that a mixture of both the Kotter Model and Lewin Change Theory were used. When it was agreed to pursue with the change, it was due to external factors and reviewing the behaviours of employees towards the current process and their motivation for change (Rees and French 2016). The first step of unfreezing through Lewin's Change Theory was used to engage the need for change and allowing us to develop a new system to remove the unbeneficial paper process. The next important step for us was clear communication with employees and allowing them to seek answers to their uncertainties through the John Kotter 8 Step Model (Mind Tools 2007). Most importantly, finding the preferred communication methods for the organisation and regularly sharing updates was identified through the process as being the Staff Portal (Rees and French 2016).

Retrospectively, the Corporate Resources Department had somewhat been appointed as employee voice representatives to test and provide feedback around the system to the project team (Baczor 2019). During a team meeting, it had been announced to the team that they would be undertaking the testing (E007). It was clearly transcribed that I would be there to support them by demonstrating how the system worked and the areas that needed to be trialled. When undertaking the trial, useful feedback had been received from the department but more positively, they were pleased with the system that had been purchased (E002).

Following discussions with Cascade GO after feedback that had been received, we were confident that we were able to provide training to employees and line managers separately (E011). The sessions had been split into three – 2 for employees and 1 for line managers only. Calendar invitations were circulated to all and they were invited to the Associations Boardroom for a demo of the system and the ability to ask any queries (E012). From the beginning, the need for the change has been communicated through the staff portal but I began by reiterating the benefits of the new system.

As the decision to introduce the system had been made by feedback from employees, we were lucky not to experience any conflict during the stages of implementation. If this would have happened, we would have put the onus on line managers to actively monitor their relationships to attempt resolving the situation informally through performance meeting but advising that they have access to the grievance policy for formal complaints (E013).

Following the demonstration, I forwarded username and passwords, a procedure and a Frequently Asked Questions document to all staff members (E014). Support had been provided through the demonstration training but we had allowed a week from staff receiving the above information prior to going live to allow them to view and become familiar with Cascade GO (E011).

Similarly to above, the effectiveness of the change implementation was discussed during team meetings, performance meetings, allowing staff members to share their thoughts on the change through sending regular update emails which they could respond to or anonymously share through our suggestion box function through the staff portal. One change that had a significant negative response from employees which had been shared through supervision meetings and fed back to me through a management meeting was the 'Bradford Score' setting which had been included within the sickness tab. It was discussed at the meeting that this score wasn't used as part of the absence management procedure and was removed from the system (E015).

3. Be able to assess the impact of change processes within an organisation

As suggested by Austin, there are three steps in managing change – Design, Engage and Sustain (2015). During the last stage of Sustaining, this is dependent on the Corporate Resources Officer and leaders building on the momentum of the implementation and driving forward the system to meet its future needs against internal and external factors (Wilkinson and Taylor 2016).

To review the implementation early on in the process, as the key stakeholder employee participation is key in progressing with the system and their comments were welcomed in any preferred format i.e. verbal, through emails, performance meetings (E010) (Austin 2015). During the next management meeting, a section had been included on Cascade GO and it allowed management to prepare notes prior to the meeting to be submitted for discussion (E016). As efficient and together is part of the Associations values, we wanted to ensure that any concerns were dealt with immediately and feedback was both ways.

To receive quantitative data, I held daily audits on the system to ensure that employees had a clear understanding of the system by ensuring that leave was inputted correctly. After discovering that the system was being used correctly, the audits lessened to once a week (E002). As part of the system, the Association is able to extract data into reports. For example, it can be used to investigate the number of leave requests that hadn't been approved which can be sent to line managers and discover if further training is necessary.

When comparing the objectives set out within the Change Management Plan with my line manager, we came to the conclusion that we had delivered a leave system which could be used by all employees from every device. This had been communicated to all key stakeholders (staff members) through a team meeting briefing (E017). There had been positive feedback received from employees and it was an opportunity to discuss the potential of using the system for further HR functions i.e payroll. Before progressing with this area, there was work needed to tailor the level of reports required for the Association against our own policies. For example, our Absence Policy advises that TOIL can only be taken in 15 mins intervals and must be taken within 6 months. To avoid further administrative duties, we are receiving ongoing support from Cascade to develop a report of all staff members which have logged TOIL and for the system to remove the outstanding amount if it has exceed the timeframe (E002).

When reviewing my ability to complete a previous change management process, I discovered that I wasn't fully utilising the tools that were available to support the initiative and guide me through the steps. When considering the John Kotter Model, many of these aspects related to the design, enact and sustain change management plan but included more detail of what was needed during each step (APM Knowledge n.d.). When discussing with my manager, it was discovered that developing a change management plan had provided us with a guide which was able to be compared against ones that had been utilised in the past and following Association procedure (CIPD 2018). Moving forward, I believe that I needed to consider different approaches to change management and the best solution for the organisation. This was a small change in consideration to restructure, new values and culture etc. but as my first change as a project officer, I'd suggest completing a review against other approaches and consider if this would have worked better or not. For example, including employee champions that could have been choose from across the organisation. This approach could have allowed me to delegate the promotion of the service to other employees across more department to spread the positives of the system and increase the momentum (Rees and French 2016).

Bibliography and References

Acas (2014) *How to Manage Change*. Available at: <https://www.acas.org.uk/media/2673/Advisory-booklet---How-to-manage-change/pdf/Acas-How-to-manage-change-advisory-booklet.pdf> (Accessed: 16 November 2019).

APM Knowledge (n.d.) *Introduction to Managing change*. Available at: <https://www.apm.org.uk/media/7367/introduction-to-managing-change-final-websample.pdf>. (Accessed: 25 November 2019).

Austin, J. (2015) *Leading Effective Change: A primer for the HR Professional*. United States of America: SHRM Foundation.

Baczor, L. (2019) *Employee Voice*. Available at: <https://www.cipd.co.uk/knowledge/fundamentals/relations/communication/voice-factsheet> (Accessed: 26 November 2019).

Gifford, J. (2019) *Employee Engagement and motivation*. Available at: <https://www.cipd.co.uk/knowledge/fundamentals/relations/engagement/facsheet>. (Accessed: 12 November 2019).

Johns, T. and Ellis, C. (2016) 'Employee Management' in Taylor, S. and Woodhams, C. (2nd ed.) in *Human Resource Management: People and Organisations*. London: CIPD.

McNally, E. (2019) *The ten Impact Essentials: A conversation with Elizabeth McNally*. Available at: <https://www.mckinsey.com/business-functions/transformation/how-we-help-clients/changing-trajectories/the-ten-impact-essentials-a-conversation-with-elizabeth-mcnally> (Accessed: 22 November 2019).

Mind Tools (2007) *Kotter's 8-step Change Model. Implementing Change Powerfully and Successfully*. Available at: https://www.mindtools.com/pages/article/newPPM_82.htm. (Accessed: 25 November 2019).

Rees, G. and French, R. (2016) *Leading, Managing and Developing People*. 5th edition. London: CIPD.

Wilkinson, T. and Taylor, S. (2016) 'Managing and Co-ordinating the HR Function' in Taylor, S. and Woodhams, C. (2nd ed) in *Studying Human Resource Management*. London: CIPD.

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
5MOG	Contributing to Change Management	Change Management Plan	E001	LD	
5MOG	Contributing to Change Management	Witness testimony from Line Manager	E002	LD	
5MOG	Contributing to Change Management	SWOT Analysis	E003	LD	
5MOG	Contributing to Change Management	GANTT Chart	E004	LD	
5MOG	Contributing to Change Management	Proposal details for new leave system – Cascade GO	E005	LD	
5MOG	Contributing to Change Management	Post training report with comments from employees on previous training delivered	E006	LD	
5MOG	Contributing to Change Management	Corporate Resources Department Team Meeting Minutes	E007	LD	
5MOG	Contributing to Change Management	Communication Plan	E008	LD	
5MOG	Contributing to Change Management	Arrangement of training for Cascade GO system	E009	LD	
5MOG	Contributing to Change Management	Communication on staff portal regarding new system	E010	LD	
5MOG	Contributing to Change Management	Email Confirmation that training will be delivered and proposed live date	E011	LD	
5MOG	Contributing to Change Management	Calendar invite for line managers and staff members training on new system	E012	LD	
5MOG	Contributing to Change Management	Grievance Policy and Procedure	E013	LD	
5MOG	Contributing to Change Management	Frequently Asked Questions and Procedure for Cascade GO system	E014	LD	
5MOG	Contributing to Change Management	Email regarding removing Bradford Score	E015	LD	

5MOG	Contributing to Change Management	Notes from Management Meeting regarding cascade GO feedback	E016	LD	
5MOG	Contributing to Change Management	Team Briefing paper with update following live date for Cascade GO	E017	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:		05/12/2019

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.

Change Plan

Created by	Lowri Davies
Date	September 2018
Version	Version 3

Vision and Objectives
To create an effective electronic absence system for all staff to use at any time of day.
Activities to achieve objectives (<i>attach Gantt chart</i>)
Activities have been included within the Gantt Chart for monitoring against timeline of events.
Business case (<i>evidence-based - include data, benefits of change, gap analysis – difference between current and future states, issues and risks</i>)
According to best practice from employees moving into the organisation, the Association were behind with electronic absence systems. The Association were currently using a paper form to record all absence which were signed off by the line manager and recorded by the HR department on their electronic year planner and duplicate copies in a lever arch file. It was taking the Corporate Resources Officer an average of 5 hours a week to process the leave requests – equating to a cost of £3,244 from her hourly wage. The cost of implementing an electronic leave system would be £2,016. When reviewing the above, it would be a saving and the time spent could be used on asks included within the operational plan. It was identified that line managers were required to have more onus on ensuring that leave absences were correct and monitored with HR completing regular audits. The risk from using paper versions were that they were being lost and not shared with the HR department for monitoring and quality assurance checks. The Association would like to be in a position where this is automated and reports could be produced instantly to demonstrate if employees are taking their leave for their own wellbeing.
People affected (<i>stakeholders – employees, particular employees, customers, shareholders</i>)
Main stakeholder will be employees, senior management and line managers.
Scope of change (<i>eg one site, one product group</i>)
The change will be across all employees which are mostly based in Head Offices (Centre of Carmarthen) but are also in four sites in Carmarthen.
Roles (<i>project manager, sponsor, team members</i>)
The Corporate Resources Manager and ICT & Procurement Manager have been responsible for including this in their operational plans as part of the direction for 2018/19. The involvement of the ICT & Procurement Manager is to ensure that the system can be utilised on the organisations servers and meet the demands of our ICT Security Policy. The Director of Corporate Resources will have the final approval for going ahead with implementing the project. The Corporate Resources Officer will be the project manager by completing the following tasks i.e. inputting data, consultation with staff, receiving feedback, sharing communication, preparing procedures and FAQ. The Corporate Resources department have been appointed to trial the system and pick up on any concerns during the test period.

Communication strategy (<i>attach communication plan, list of change champions</i>)
The purpose of our Communication Strategy is to ensure a fully integrated approach to communications; one which is aligned with the Association's business plan. It will cover our corporate identity and brand, our selling points, our target audiences and our purpose for communication with them. It is about influencing the behaviours of our customers, employees and partners. Our strategy will accurately capture, reflect and respond to our stakeholder's experience. The format of communication will be chosen with regard to cost (including both production and delivery), environmental impact, suitability and preferred method of contact for the intended audience.
Support to be offered (<i>advice, counselling, coaching, mentoring, representation, training - attach, for example, a training plan</i>)
An overview of the system will be shared with employees. Line managers will have a separate training session to ensure that they are aware of the requirements of approving leave requests in line with the Absence and Time Off policies. Support can offered through performance meetings and shared through to HR. HR Department will be recognised as the point of call for all enquiries.
Timings and milestones (<i>see Gantt chart</i>)
The project has a timeline to be completed in a maximum of 6 months. It isn't urgent but would like for it to be in place for the next financial year. A more detailed overview of the process can be found within the Gantt chart.
Resources required, including cost (<i>equipment, time, people, materials, guidance</i>)
Corporate Resources officer would use her work computer to input the data on to the system. The system can also be accessed from mobile devices. The cost to the change is £168 per month for up to 40 employees and the time for members of the Corporate Resources dept to participate. The majority of the people using the system will be the Corporate Resources department and their time will be considered by checking their calendars for availability. Guidance and videos can be accessed on the new electronic absence system to demonstrate how different parts of the system can be used. This is accessible to all staff. Also, a support helpdesk to deal with enquiries that cannot be resolved.
Monitoring activities
Usage reports. Continue momentum by sharing upgrades to the system through staff portal. Compare against GANTT chart and if milestones and timeline were achieved Feedback from stakeholders. Social media site for pulse surveys
Success Measures
Feedback from employees. Complete an email survey. Review time used by HR Department on dealing with concerns and quality assurance.

Name	Rhian Layton	Job Title	Corporate Resources Manager
Witness Testimony As part of the development of the organisation and staying ahead of the curve, both departments have operational plans to include projects that are required to be developed over forthcoming months and years. The next project assigned to the HR function within the Corporate Resources department was introducing an electronic self-service on-line HR System for employees to record holiday and sickness requests. The current paper system had been in place for many years, was very time consuming and took resources away from other potential projects that could have moved forward earlier. Lowri, Director of Corporate Resources (DoCR) and I met at the beginning of September 2018 to discuss the needs and objectives of the system and what was required from our perspective. Comments had been received from staff members that they would easily lose their paper forms and it would take time for the information to be inputted on to the calendar for them to ensure that there was cover in the office whilst they were away. Also, the DoCR had shared that he had used an electronic system in all of his previous workplaces and it was proposed that the Association needed to move ahead with technology in the HR function. From this, we devised a change management plan and decided that Lowri would take the lead as she was currently responsible for recording and monitoring leave. An initial meeting had been held with the ICT and Procurement Manager and Lowri to discuss the ICT and security implications of purchasing a system which would be accessible from the Associations server. Both companies had sent a link to their websites to allow the ICT department to review their security settings. After careful review, they were happy that the systems were safe and secure to be accessed by all staff from company and personal devices. Both Lowri and I worked closely together to ensure that the system met our objectives and would be able to comply with our current leave needs. Following deliberation and approval from the Executive Management Team, Cascade GO was chosen as our system providers. From this point forward, I delegated this project to Lowri to input the data into the system and keep staff updated with progress with its development. There had been occasions that Lowri had requested support on how to deal with a matter i.e. there had been feedback from the testers (Corporate Resources department), if the system would automatically calculate the annual leave entitlement each year or would this need to be inputted manually with any leave carried forward. Other than this, the department were pleased with the implementation of a new system and thanked Lowri for her support in answering any concerns they had. Once the input of data and testing had been completed, Lowri checked with both myself and DoCR if we were happy for training to be provided to staff. We were happy with the work that Lowri had completed on the system and that training could be delivered to staff. Three training sessions were held in the offices with Lowri creating a detailed procedure and Frequently Asked Questions document to support employees with the change. CascadeGO went live on 1 March 2019, the first few weeks were critical to determine if any further training was required and preparation to answer any concerns that had arisen. Lowri had arranged for daily audits to be taken on the system for the first few weeks to nip in the bud any errors.			

From my part, the only concern that I had was the ability to use the system to generate reports that would be beneficial to what we needed. More importantly for the TOIL system, it would be less time consuming if there was a report that would be able to generate TOIL balances and work in accordance with our absence management policy. Lowri has been working closely with our account manager to develop a report but they haven't provided an update to determine if this report would be made available.

Overall, I was pleased with how the change had been initiated and believed that we all worked in accordance with the Association's values to achieve the change.

Signature		Date	06/12/2029
------------------	---	-------------	------------

SWOT Analysis

Within the organisation, discussions have been held on how the organisation can make their current HR processes leaner to utilise their resources more efficiently. From recruitment, health and safety, training and development, it was agreed to begin with the processing of leave and absence requests.

To identify the need for change, it was agreed to complete a SWOT analysis. This is used by identifying the strengths, weakness, opportunities and threats of a current process to consider the need for change. It is appropriate to identify the following areas to ensure that it is aligned with the organisations future organisational objectives and will provide a positive outcome to the desired goal.

Strengths	Weaknesses	Opportunities	Threats
Offer above statutory annual leave amount.	Paper copies which can be lost.	Leaner processes leading to growth in other strategical areas.	Development of AI technology in other organisations.
HR department have expertise in using the current system.	Time consuming.	More resources to share with Senior Management.	Competitors offering more lean processes.
Employees have clear understanding of process.	Delay in accurate data on system if HR absences.	Modernising system and be able to have more comparable data with other Associations.	Competitors offering more benefits to employees.
Two-way verbal communication between line manager and employee.	Financial aspect of using an external system.	Technology development leading on to other opportunities to widen HR functions within system.	Fast pacing technology changes and being lost behind.
Employee leave chart copies are held with HR to avoid loss or misunderstanding.	Skills gap for employees not confident with digital inclusion.		
	Only HR department are able to examine the current data.		

		2018/19						
No. Electronic Absence System		September	October	November	December	January	February	March
1	Meet with Director of Corporate Resources and Line Manager to discuss objectives and needs of system.							
2	List objectives and needs of sytem and consider against external companies offering the system							
3	Set up a meeting between Corporate Resources Manager, ICT & Procurement Manager and Project Manager with external companies							
4	Receive quotes and list negatives and positives from both companies							
5	Submit information to Director of Corporate Resources for final approval							
6	Inform employees that there will be change to the system and will be communicated throughout the process							
7	Project Manager and Corporate Resources Manager to meet with chosen company to go through system and inputting employee data							
8	Corporate Resources Officer to input data into the system							
9	Trial the system with the Corporate Resources Department							
10	Receive feedback from Corporate Resources Department and fix any concerns							
11	Arrange training session with employees to provide an overview of the system							
12	Arrange training session with Line Managers to provide an overview of the system							
13	Develop a proedure and FAQ document to be uploaded to staff portal							
14	Share username and passwords to enter system							
15	Inform employees of live date							
16	Receive ongoing feedback from employees to mitigate concerns							
17	Corporate Resources Officer to complete daily audits for first two weeks							
18	Extend audits to weekly ongoing							

Lowri Davies

From: Lowri Davies
Sent: 04 December 2019 17:34
To: Lowri Davies
Subject: FW: Cascade GO - Proposal details
Attachments: CascadeGo brochure.pdf; 2017 Security and Business Continuity Document.pdf

From: Rhodri Jones
Sent: 09 October 2018 17:17
To: Lowri Davies; Rhian Layton; Matt Allen
Subject: FW: Cascade GO - Proposal details

Hi all,

Cheers for the information provided and the time that you've taken to meet with them.

I'm happy to go ahead with Cascade GO. They seem to be best value for money, provide what we need and I have previously used them in another company.

Again, thanks for all your hard work.

Diolch
 Rhod

From: Lowri Davies
Sent: 08 October 2018 08:42
To: Rhodri Jones ; Rhian Layton ; Matt Allen
Subject: Cascade GO - Proposal details

Hi all,,

As discussed I have put together some notes on the proposed HR system – Cascade GO .

Costs for 40 live employees

Cascade Go Professional £140 per month

Set up

Set-Up/Configuration £250

Data Import £395 but this can be completed in house by me.

Training Options

Webex Training £250

**All costs ex-VAT

Features – overview

- Sickness recording
- Holiday booking
- TOIL tracking
- Self service update of staff details
- Reporting in-built
- Potential links to Payroll (if and when required)

- ISO27001 and ISO9001 accreditation
- Monthly cost
- Support provided
- 30 day contract/notice period

Added value

- Offer of an additional 10 employee licences free of charge, taking us up to 50 live employee licences.
- The “Read and accept” features of the software will be a direct replacement for the current Sharepoint based “DocRead” system.

Upgrade cost of next “DocRead” upgrade will be saved - £1590

Yearly support cost for “DocRead” will be saved - £250.00

- Single sign on available / Integration to existing “Staff Portal”
- An “App” will be available as part of the monthly cost, the main website is mobile friendly though so there are options around the use of this.

As previously mentioned, the time spent by the Corporate Resources department on this every week was an average of 5 hours. When calculating this against 52 weeks a year and hourly rate (£11.11), it would work out as £250 a month. If we went ahead with this system, it would be a saving of approximately £88 which would allow us to work towards other projects.

We’ve all discussed and would like to go with Cascade GO. Happy to discuss further with you or if you’d be happy to reply to the email that you’d be happy to go along with this provider?

Diolch,
Lowri

Post Training Report by user



5 highest - 1 lowest

Name	Course Title	Was training useful	Was training helpful	Would you recommend	Further Comments
Charmaine Meakins					
	Staff Business Planning Away Day	4	4	Yes	Enjoyable Day
Helen Williams					
	Staff Business Planning Away Day	5	5	Yes	
Mandy Sharp					
	Staff Business Planning Away Day	5	5	Yes	It was nice to see senior management taking the lead in the project and making us aware that the changes we were making would influence the strategic direction of the company.
Mathew Davies					
	Staff Business planning away day	5	5	Yes	Was good to involve staff members from the hostels and for all staff to really get involved and enthusiastic on the future direction of the association.
Paul Edwards					
	Staff Business Planning Away Day	5	4	Yes	I think that it was a good opportunity to have an open dialogue session, allowing the whole team to influence the way forward for the association.
Rhian Layton					
	Staff Business Planning Meeting 19 September	5	4	Yes	It was good see all staff attending the meeting (including Care staff) on the day. Group discussions and activities were interesting. Discussions regarding Values - it seemed that there were key themes raised by all the groups. Good day!
Rosanna Baxter					
	Staff Planning Away Day	4	4	Yes	
Samantha Fell					
	Staff Business Planning Away Day	5	5	Yes	Nice to get out of the office and hear everyone's opinions that you wouldn't normally speak to every day or as part of your work.
Tracy Rees					
	Business Planning away day	5	5	Yes	Useful to get everyone together and a good opportunity for staff to contribute to the plans of the Association.

Corporate Resources

Department Meeting

24/10/18 09:00, Meeting Room 2

Agenda

1. Apologies
2. Minutes of the previous meeting
3. Matters arising
4. Standing Items
 - a. BMHA-wide updates
 - b. (Operational Plan)
 - c. Risk
 - d. Health & Safety
 - e. Complaints & Compliments
 - f. Equality & Diversity
 - g. GDPR
5. AOB
 - Implementation of Absence System

Present: Corporate Resources dept.

Ref	Action / Note	Resp.
1.	Welcome and Apologies Rhodri Jones (RJ) welcomed all present to the departmental team meeting. Apologies were received from Erika Mazuriene and Mathew Davies.	
2.	Minutes of the previous meeting Minutes of the meeting held on 24/10/2018 were approved by those present.	
3.	Matters arising The following matters were raised from the minutes of the previous meeting: Operation Plan: RJ has updated the operational plan and is available on the Intranet for all present to view. You said we did: It had been established that 'you said, we did' responsibility lied with Housing but LD would lead on collating them for the Corporate Resources department and forwarding on. Cascade Go: Progressing well but HR had experienced minor delays. The Association are hoping to be live by December.	

	Website: MA advised that it had been agreed that Property & Customer Services department would be responsible for confirming the content that would be uploaded to the website with Corporate Resources uploading and translating. A few concerns had been raised and RJ agreed to discuss further at the next EMT meeting.	
4.a	BMHA-wide updates RJ, MA, MD & RL presented the BMHA-wide update. A copy would be made available on the intranet following the meeting. The following points were raised for actioning: • Community Benefits: All present to take into consideration areas in the local community that the Association could support. • Value Wales: Discuss with MA if Value Wales system is compatible with QL ledgers. • Glannant House: Query if it had been agreed for European TV satellites to be mounted during the upgrade works.	
4.b	Operational Plan An updated copy of the operational plan was available on the intranet. It was suggested that it be submitted to supervision meetings for discussion.	
4.c	Risk There were no risks noted at the meeting. RJ advised that they're currently in the process of moving the risk register to the staff portal.	
4.d	Health and Safety In relation to the Mental Health & Wellbeing training held on 26/27 November, positive feedback had been received across the organisation. A handbook had been distributed to all attendees, which contained useful information for future use. RJ announced that HW and LD would be attending Mental Health First Aid training along with all Mental Health Support Workers on 6/7 February. Following the most recent Fire Evacuation Drill, it was agreed to take a photo of the sign in screen to ensure that an accurate staff list was available.	
4.e	Complaints and Compliments Since August 2018, all compliments received and logged had been relocated to the staff portal to view due to data protection principles. No complaints had been received.	

4.f	Equality and Diversity In regards to the QED Award, RJ reminded all present that a draft report had been received from Tai Pawb. This would be revisited in the New Year.	
4.g	GDPR There were no updates or concerns raised. RJ advised that a GDPR Group meeting would be scheduled for January/February 2019.	
5.	AOB Implementation of Absence System RJ advised all present that the Association would be continuing with purchasing an online system for employees to record their absences. The project would be ran by the Corporate Resources Manager and Corporate Resources Officer within the HR department. It was highlighted that the Corporate Resources department would be asked to test the system prior to its live date of February/March 2019. Further updates and progress would be shared with team as the system developed through emails and the staff portal. There were no questions raised but all present were pleased with the progress of moving forward with the absence system. Hafan Cymru MA advised that Hafan Cymru have agreed to purchase the QLx System from Aaeron.	
6.	Date of next meeting: 30 January 2018 (Departmental Update for December will be circulated to all staff via email).	

As part of our change initiative, going electronic with our leave system, the biggest concern within the HR department was ensuring that the approach was fair to all employees. This was important as all employees would be affected by the change and the system would be used on numerous occasions every day. It was agreed that the most effective way of communicating the change to all staff would be through the staff portal. It is accessible to all on every occasion and wouldn't be biased to employees in Head Offices.

Below is an overview of the communication strategy;

Who are we?	Bro Myrddin Housing Association is a Housing Association based in West Wales providing social housing to over 2,000 residents in Carmarthenshire.
Need for change?	The Association are currently reviewing their HR processes and the need to make them leaner and utilising the resources in more strategical areas. The Leave system is currently used by paper and there are a number of negatives to this i.e. lost charts, time consuming to make copies, human error.
Will staff agree with this?	The decision has been made as it has been raised by a number of employees from different departments. The most significant areas are employees which are not based in the head office. Data can be out of date for weeks and will not be able to receive instant authorisation from managers if based in different locations.
Aim and objectives	The Association wishes to achieve a consistent and fair process for each employee. To request feedback on the effectiveness of the system and need for further changes. To encourage employee champions to understand the system and provide support to team members. To provide guidance on how to use the system successfully.
Main stakeholders	In this instance, each employee will be affected by the change, from; CEO Senior Management Line Managers Employees in both Head Officers and external bases.
Key Messages	To encourage employees that the leaner process will lessen their time, be available in one secure electronic system and free up resources from HR to deal with other enquiries and projects.
Communication Channels	Throughout the process, staff will be kept informed of updates and changes through the Staff Portal. This is accessible to everyone 24/7 and can be viewed from the messages tab on the front page.
Risks	Employees not keeping themselves updated through the staff portal. Employees away from the workplace on leave and being unmotivated as haven't been able to share their views. Accuracy of new system. Correct training to use the system. Not confident in using the internet and electronic system.
Measurement	Employee feedback through team meetings.

	3 monthly review of system. Audit of number of employees visiting site each day.
Review	Complete weekly audit on accuracy of data input. Continue sharing information on staff portal. Include all employees in change initiative.

Lowri Davies

From: Lowri Davies
Sent: 04 December 2019 17:44
To: Lowri Davies
Subject: FW: Cascade Go Training Tuesday 4th July 9.30 until 12.30

From: Haley Ramsdale [mailto:Haley.Ramsdale@cascadehr.co.uk]
Sent: 28 November 2018 10:43
To: Rhian Layton; Lowri Davies
Subject: Cascade Go Training Tuesday 4th July 9.30 until 12.30

Hi Rhian

This email is to confirm your HR WebEx training on Tuesday 4th July at 9.30am and to check whether you have any questions.

The training is for up to 3 Administrators of the system, could you therefore please confirm who will be attending the WebEx along with their email address and job title?

- You will need to have a laptop/pc available to view the training via a web link, for the audio you can either dial in using a phone (or conference phone) alternatively you can use a headset or speakers.
- We will be logging in as one of the designated Set Rights users, please be aware that as we will be logging in as the designated employee we will be sharing their personal details to those who will be in on the training. (You will therefore need your log in details)
- To give you a brief overview of what the HR training will include:
 - An overview of system navigation and key functionalities
 - An introduction to the key screens viewed from the System Administrator perspective and from the Employee Perspective
 - We will look at the permissions your employees and Line Managers need through the Skills Matrix
 - System tools and Utilities: this is where we will set up the rules that drive the system, you can run exports and reports, also where additional functionalities are situated.
- Training may take upto 3 hours with a break mid way through. I will send you through the WebEx link approximately 15 minutes before the training.

If you have any further questions please feel free to contact our service desk on 0113 230 8627, they are available 9.00 – 17.00 Monday to Friday excluding Bank Holidays.

Kind Regards

Haley Ramsdale
Product Consultant

Extension:
Mobile: 07966 959259

 Staff Portal staff.bromyrdin.co.uk	1042	25/03/2020	Staff Training Day
	756	01/07/2020	HOME COMPANY ▼ Cascade HR Simply Health 
Policy Explorer	693	23/09/2020	Staff Training Day
Document Repository	175	11/12/2020	Staff Training and Christmas Party
		11/03/2020	National No Smoking Day

Messages	
Priority	Message Text
Medium	Exciting news!! We have had confirmation that we are able to begin implementing our new annual leave system - Cascade GO! It is an electronic online system which will allow us to get ride of those bug bear paper forms and allow all absences to be recorded in one place. The system will generally allow you to record annual leave, medicals, TOIL, Christmas leave etc... which will generate an email for your line manager to approve. You can complete these requests from your computer or mobile device! If you have any queries regarding the system or would like to provide any comments on additional areas for inclusion, please email me, speak with your line manager or anonymously add a note in the suggestion box... Lowri

Lowri Davies

From: Lowri Davies
Sent: 15 February 2019 11:40
To: Amy Cooper; Bethan Richards; Clare James; David Burrows; Dorothy Lacaman; Dylan Goddard; Eirlys Smith; Erika Mazuriene; Gary Humphreys; Gary Jenkins; Gemma Watkins; Helen Williams; Hilary Jones; Karen Howes; Llinos Davies; Louise Scarr; Lowri Davies; Lynette Bryan; Mandy Sharp; Mathew Davies; Matt Allen; Paul Edwards; Ray Hewson; Rhian Layton; Rhodri Jones; Rosanna Baxter; Samantha Fell; Samantha Jones; Tracy Rees; Charmaine Meakins; Mandy Sharp
Subject: Cascade GO
Follow Up Flag: Follow up
Flag Status: Completed

Hi all

Next week, training has been arranged to provide you with an overview of our new leave system – Cascade Go.

For you all to be aware, I've stopped recording leave in the outlook year planner as I'm uploading all this data on to the new system in preparation for its rollout on 1 March.

Please would you ensure that your leave, medical and TOIL sheets are up to date and passed to me to ensure that the system correctly reflects your paper sheets (if I've ticked the side, then I've seen it).

Following the training, I'll circulate username and passwords for the new system along with an overall briefing of how to use the system.

Many thanks
Lowri

Calendar

Cancel Meeting Forward

Appointment Scheduling Tracking Assistant

Skype Meeting Meeting Notes

Contact Attendees Address Book Check Response Names Options

Show As: Busy Reminder: None Recurrence Time Zones Categorize High Importance Low Importance Tags Zoom Apps for Office Add-ins

Rhodri Jones Paul Edwards: These recipients are sending automatic replies.
Attendee responses: 9 accepted, 0 tentatively accepted, 2 declined.

To... Tracy Rees; Rhodri Jones; Hilary Jones; Mandy Sharp; Helen Williams; Rhian Layton; Matthew Davies; Matt Allen; Clare James; Paul Edwards; Lynette Bryan

Subject Cascade Go - Line Manager Training

Location Boardroom

Start time Wed 20/02/2019 15:00 All day event

End time Wed 20/02/2019 15:30

In Shared Folder Calendar - Lwari.davies@brommurdin.co.uk

Calendar

Cancel Meeting Forward

Appointment Scheduling Tracking Assistant

Skype Meeting Meeting Notes

Contact Attendees Address Book Check Response Names Options

Show As: Busy Reminder: None Recurrence Time Zones Categorize High Importance Low Importance Tags Zoom Apps for Office Add-ins

Rosanna Baxter: Automatic reply: "Thank you for your message. I will be returning to the office on 03/12/19. If your message is urgent please contact the office on 01267 232714. Diolch am eich neges. Fe fyddaf yn dychwelyd i'r swyddfa ar 03/12/19."

Attendee responses: 5 accepted, 0 tentatively accepted, 0 declined.

To... Dylan Goddard; Eirlys Smith; Erika Mazurkiewicz; Amy Cooper; Rosanna Baxter; Bethan Richards; Gary Humphreys

Subject Cascade Go - Training

Location Boardroom

Start time Wed 20/02/2019 11:30 All day event

End time Wed 20/02/2019 12:00

BRO MYRDDIN HOUSING ASSOCIATION

GRIEVANCE POLICY & PROCEDURE

1. INTRODUCTION

What is a grievance?

A grievance is a complaint made by an employee to their employer. Such complaints need a formal procedure to ensure that they are dealt with in a fair and equitable manner.

Issues that may cause an employee to raise a grievance include, but are not limited to, the following:

- Terms and conditions of employment
- Health & safety
- Work relations
- New working practices
- Working environment
- Organisational change
- Equal opportunities

These Grievance Procedures should be used to deal with complaints and they are intended to be fair, consistent and quick. The process is in compliance with the requirements of the ACAS Code of Practice.

Bro Myrddin Housing Association wishes to assure employees that they will not suffer penalty or recrimination for taking out a grievance against their employer or a work colleague and the Association is committed to the right of its employees to instigate Grievance Procedures when all other reasonable actions have failed to lead to a resolution of their complaint.

Grievance or Disciplinary?

Grievance Procedures are not intended for use by Managers against employees. Where Managers wish to take action against staff the Disciplinary Procedure should be used.

2. INFORMAL GRIEVANCE PROCEDURE

In the first instance staff should try to resolve any grievances informally with their line manager. However if the grievance is in relation to the line manager of the employee, then a manager with whom the employee feels comfortable should be contacted. The manager thus selected will be required to assist in resolving the problem without reference to the formal procedure. If the matter cannot be resolved in this manner, or is of a serious nature, the manager should refer the employee to the formal grievance procedure.

3. FORMAL GRIEVANCE PROCEDURE

In order to instigate the formal Grievance Procedure, the employee should write to their line manager outlining the reason for the grievance. If the grievance is in relation to the line manager then the employee should write to the Director of Corporate Resources who will appoint another senior officer (or an independent external advisor) to manage the process.

The line manager will arrange a meeting to discuss the grievance within 7 days of receiving the letter.

The employee must be informed of their right to be accompanied by a work colleague, or by a Union representative, at this meeting. If any party is unable to attend the meeting then a new date will need to be made. This should aim to be within 5 working days of the original date.

In some grievance cases further investigation is essential. In such cases witnesses will be interviewed and statements obtained. Witnesses do not have the right to be accompanied at investigatory meetings

Minutes will be taken at all meetings copies of which, including any statements taken will be sent to the employee making the complaint for consideration. A further meeting may be arranged to discuss with the employee the statements obtained. Again in these cases the employee making the complaint will have the right to be accompanied by a work colleague or Union representative.

The line manager will complete a factual report and meet with the employee who has submitted the grievance to discuss its content and her/his decision.

In the event of a Grievance or Complaint from an Employee against the Chief Executive

In the event of a Grievance or Complaint from an employee against the Chief Executive, the following process should be followed.

The employee should initially speak to the applicable Director or if they feel unable to do so they should speak to the Director of Corporate Resources.

If the Director is unable to resolve the issue or if the matter is agreed to be serious, the Director of Corporate Resources will inform the Chair of the Board of the grievance immediately.

A Board member will be appointed to investigate the grievance (a senior officer or an external party may assist with the investigation).

Should a hearing be necessary or should outcome result in disciplinary action. The Chair will convene a panel from the Board to consider the allegation.

Any appeal resulting from a decision should be made to the Chair of the Board. Employee will be informed of process of appeal.

What may be the potential outcome of the Grievance procedure?

These could include:

1. A finding that there is no basis for the grievance.
2. A formal apology being given by the person against whom the grievance has been brought.
3. A recommendation for a conciliatory meeting to explore a way forward,
4. A recommendation that training is required by one or other of the parties
5. A recommendation to invoke the disciplinary procedure.

The employee will be notified of the decision in writing within 5 working days of the meeting.

If the grievance is against another employee, they will also be informed of the outcome as it relates to them, including any action required from them (e.g. if a formal apology is deemed necessary).

4. APPEAL

If the employee who submitted the grievance is dissatisfied by the decision, he/she must appeal, in writing, to the Chief Executive within 5 working days. If the complaint involves the Chief Executive then the appeal should be made to Chair of the Board.

The Chief Executive will consider the appeal within 5 working days of receiving in writing, the appeal request. The employee will be notified in writing, of the appeal hearing time and date, and will also be informed of their right to be accompanied by a colleague, friend, or union representative. The Chief Executive may appoint another senior officer to consider the appeal.

The employee will be notified of the appeal decision in writing within 5 working days of the hearing.

5. COLLECTIVE GRIEVANCES

Where there is a Grievance against the employer, on the same issue involving two or more employees, this shall be dealt with as a Collective Grievance. In this case the employees should initially, raise the matter informally with their line manager.

If they remain dissatisfied, then the employees should write to the Chief Executive or their Line Manager. The timings and procedure for responses should be as outlined in the Grievance Procedure.

6. DISCIPLINARIES AND GRIEVANCES

Where an employee raises a grievance during a disciplinary process then it may be necessary to suspend the disciplinary process in order to deal with the grievance. Where the disciplinary and grievances are related it may be appropriate to deal with both issues concurrently.

7. MEDIATION

What is mediation?

Mediation seeks to provide an informal and speedy solution to individual workplace conflict, and can be used at any stage of the disagreement or dispute. The process is entirely voluntary, it is flexible, and any agreement is morally rather than legally binding. What the process offers is a safe confidential space for participants to find their own answers with the support of a mediator. It does this in a number of ways:

- by exploring the issues, feelings and concerns of all participants and rebuilding relationships using joint problem solving
- by allowing those involved to understand and empathise with the feelings of those they are in conflict with
- by helping participants develop the skills to resolve workplace difficulties for themselves in future
- by encouraging communication and helping the people involved to find a solution that both sides feel fair and offers a solution that favours them.

Mediation is increasingly being seen as providing managers with an additional tool to deal with disagreements between individuals in the workplace and subject to the agreement of all parties this may be an appropriate process to adopt to try and resolve an issue. If necessary an external mediator may be appointed.

Version	3
Date of Policy	April 2019
Date approved by P&R	May 2019
Next review date	May 2022
Responsible Person	Director of Corporate Resources



Cascade Go – Procedure

To access Cascade Go, either

1. Visit the Staff portal as there is a tab that will take you directly to the website; or
2. Type in 'Cascade Go' to google and it'll be the first option.

It'll bring you to this page, which will require the username and password that was circulated to you from the HR department via email.

Your leave will now be in days, but you all have set working patterns that will automatically calculate the number of hours you must take in a day.

HOME | COMPANY ▼ | BLOG | Cascade HR

HR Login

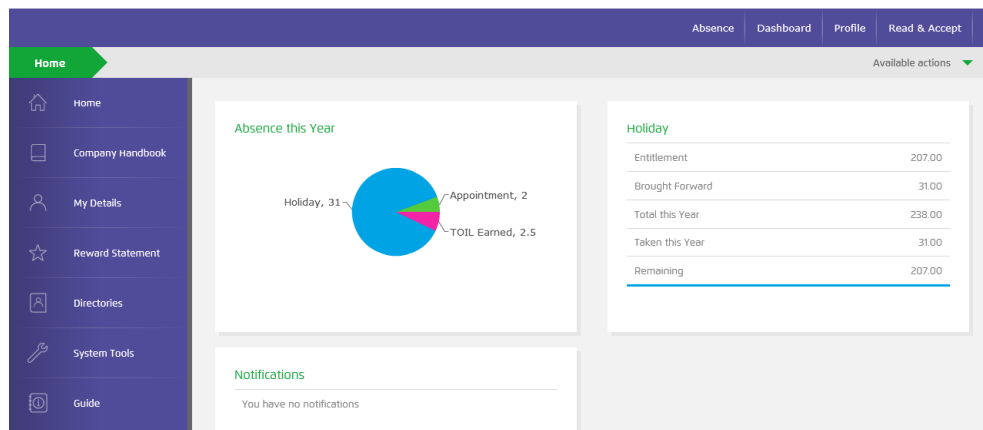
Username

Password

Login

[Forgotten username?](#)
[Forgotten password?](#)

This will be your homepage. It gives an oversight of your absences this year and how much holiday you have remaining.



The area that you need to access to record your absences, is the *My Details* tab on the left hand side. It'll bring you to the *Personal* tab. Here, you are able to update those records to ensure that they are current i.e. Next of Kin.

The next tab, *Contract*, will be greyed out and it is only HR that will have access to update these details, if and when they change. It will include your holiday entitlement amount.

Personal Contract Payroll Absence Accidents Benefits Documents Equipment Pro. Mem. Tasks Training

Home My Details

Personal » Lowri Davies

Save Cancel

Title: Miss
 Known As: Lowri
 Forenames: Lowri Ann
 Surname: Davies
 Initials: LD
 Address:
 Gender: Female
 Marital Status: Partner
 Date of Birth (Age: 0):
 Employee Number: 123
 Work Email: lowri.davies@bromyrdin.co.uk
 Work Phone: 01267232714
 Work Extn: 239
 Work Mobile:
 Personal Email:
 Personal Mobile:
 Home Phone:

This is the most important tab for you – *Absence*. It is where you will create all the holiday, TOIL and other absence requests.

On this main screen, it will provide you with an overview of your current entitlement for Holiday and TOIL.

On the bottom, it provides you with an overview of all your approved absences in your current calendar year. It is colour categorised for each absence type.

Absence » Lowri Davies

Holiday

Entitlement	207.00
Brought Forward	31.00
Total this Year	238.00
Taken this Year	31.00
Remaining	207.00

Sickness

Total Taken	0.00
Occasions	0.00
Rolling Year	
Rolling Year Occasions	
Bradford Score	

TOIL

Earned	4.50
Taken	0.00
Remaining	4.50

Absence Year

01/02/2019 - 31/01/2020

Absence Requests Table:

Absence Type	Date From	Date To	Duration	Absence Reason	Status
Appointment	12/03/2019	12/03/2019	0.50 (hrs)	Medical	
Appointment	18/02/2019	18/02/2019	0.75 (hrs)	Medical	
Appointment	11/02/2019	11/02/2019	0.75 (hrs)	Medical	
Holiday	18/03/2019	18/03/2019	3.50 (hrs)	Authorised Leave	
Holiday	26/02/2019	01/03/2019	27.50 (hrs)	Authorised Leave	
TOIL Earned	13/02/2019	13/02/2019	2.50 (hrs)	TOIL Earned	

Select the box to make all absence requests.

Here, you can view who is absent from your dept.

You can move back and forward from your current, previous and future entitlement years.

Shows dropdown of all approved, declined, cancelled and pending absence requests.

This is an example of the View Group button page. You will only be able to see everyone in your department and move from month to month. Calendar has an X for days that you don't work.

Group Absence » Lowri Davies

February 2019	Fr 1	Sa 2	Su 3	Mo 4	Tu 5	We 6	Th 7	Fr 8	Sa 9	Su 10	Mo 11	Tu 12	We 13	Th 14	Fr 15	Sa 16	Su 17	Mo 18	Tu 19	We 20	Th 21	Fr 22	Sa 23	Su 24	Mo 25	Tu 26	We 27	Th 28
Allen, Matt (22)																												
Baxter, Rosanna (142)																												
Bryan, Lynette (164)																												
Cooper, Amy (24)																												
Davies, Llinos (165)																												
Davies, Lowri (123)																												
Davies, Mathew (117)																												
Edwards, Paul (152)																												
Fell, Samantha (116)																												
Goddard, Dylan (23)																												
Hewson, Ray (151)																												
Humphreys, Gary (138)																												
James, Clare (140)																												
Jenkins, Gary (136)																												
Jones, Hilary (97)																												
Jones, Rhodri (162)																												
Jones, Samantha (7)																												
Lacaman, Dorothy (166)																												
Layton, Rhian (9)																												
Mazurienne, Erika (168)																												

Group Absence » Lowri Davies

Calendar navigation: Last Month, Next Month, Previous Page, Next Page

Legend:

- Toggle All
- Appointment
- Bank Holiday
- Christmas Le.
- Compassionat.
- Holiday
- Sickness Abs.
- TOIL Earned
- TOIL Taken
- Unauthorised

Request » Lowri Davies

Date From: 21/02/2019

Date To: 22/02/2019

Work Pattern (Hours):

Mo	Tu	We	Th	Fr	Sa	Su
7	7	7	7	6.5	0	0

Absence Type: Holiday

Absence Reason: Authorised Leave

Comments:

Include Saturday: ☐

Include Sunday: ☐

Half Day Start: ☐

Half Day End: ☐

Approver: Layton, Rhian (9)

Send To: rhian.layton@bromyrdin.co.uk

Send Close

Holiday Requests

- As you can see, as I've selected a Thursday and Friday as leave, it has calculated the number of hours that I will need to take from my working pattern.
- Select from the drop down menu, Holiday and Authorised Leave for an A/L request.
- For ½ day, select the number of hours from the working pattern box (3.5 or 3.25 for Fridays)
- The request will be sent to the approver when you press 'Send' and it will appear as pending until approved.

ould
thing.

Appointment

Requests

- Select the date that you require the appointment.
- Within the work pattern – click the highlighted number box until you reach the amount of time that you will be away from the office i.e. 0.25 (15 mins), 1.5 (1 hour 30 mins).
- Select Appointment and either Medical or Dental as absence reason.
- Write in the comments box, the time that you will be required to leave the office.
- The request will be sent to the approver when you press 'Send' and it will appear as pending until approved.

TOIL Request

Request » Lowri Davies

Date From: 21/02/2019

Date To: 21/02/2019

Work Pattern (Hours):

Mo	Tu	We	Th	Fr	Sa	Su
7	7	7	1.5	6.5	0	0

Absence Type: Appointment

Absence Reason: Medical

Comments: Appt at 09:00.

Include Saturday: ☐

Include Sunday: ☐

Half Day Start: ☐

Half Day End: ☐

Approver: Layton, Rhian (9)

Send To: rhian.layton@bromyrdin.co.uk

Send Close

Request » Lowri Davies

Date From: 21/02/2019

Date To: 21/02/2019

Work Pattern (Hours):

Mo	Tu	We	Th	Fr	Sa	Su
7	7	7	3	6.5	0	0

Absence Type: TOIL Earned

Absence Reason: TOIL Earned

Comments: 16:30 - 17:30 Board Meeting

Include Saturday: ☐

Include Sunday: ☐

Half Day Start: ☐

Half Day End: ☐

Approver: Layton, Rhian (9)

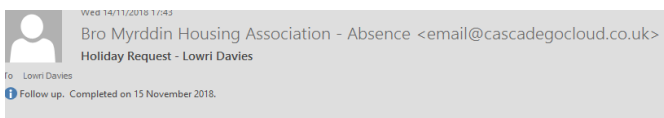
Send To: rhian.layton@bromyrdin.co.uk

Send Close

- Select the date that you earned TOIL.
- Within the work pattern – click the highlighted number box until you reach the amount of TOIL that you earned or would like to request i.e. 0.25 (15 mins), 1.5 (1 hour 30 mins).
- Select TOIL earned and TOIL earned as type and reasons. It will be TOIL taken and TOIL request for it to be used.
- In the comments box, make a note of the time that you have earned/requested the TOIL and the reasoning why.
- The request will be sent to the approver when you press 'Send' and it will appear as pending until approved.

IMPORTANT. You are only able to select 15 mins (0.25) or more

The line manager approval / decline confirmation email will come from **Bro Myrddin Housing Association - Absence** [email@cascadegocloud.co.uk]



You will receive the same email for other absence requests, even if they have been approved or declined.

Your Holiday request (detailed below) has been approved by Rhian Layton.

Company	Bro Myrddin Housing Association
Employee	Lowri Davies
Date From	31/10/2018
Date To	02/11/2018
Duration	3
Absence Type	Holiday
Absence Reason	Authorised Leave
Half Day Start	No
Half Day End	No
Comments	

This wording would say 'declined' instead.

Cancel Requests

Status					
Feb 2019 - Jan 2020					
Absence Type	Date From	Date To	Duration	Absence Reason	
Holiday	18/03/2019	18/03/2019	3.50 (hrs)	Authorised Leave	×
Appointment	12/03/2019	12/03/2019	0.50 (hrs)	Medical	×
Holiday	26/02/2019	01/03/2019	27.50 (hrs)	Authorised Leave	×
Appointment	18/02/2019	18/02/2019	0.75 (hrs)	Medical	×
TOIL Earned	13/02/2019	13/02/2019	2.50 (hrs)	TOIL Earned	×
Appointment	11/02/2019	11/02/2019	0.75 (hrs)	Medical	×

To cancel the absence request or approved absence, click on the line of the absence that you'd like to remove.

This pop up box will appear.

Press 'cancel' and the request email will be sent to your line manager to approve.

****Please note that Cascade GO records will not filter into Outlook. You will still have to make a note of your absence records in your Outlook Calendar****

For Line Managers Only

To approve requests, you will receive an email from **Bro Myrddin Housing Association - Absence** [email@cascadegocloud.co.uk] and it will look like this.

Lowri Davies (123) has requested the following Holiday

Company	Bro Myrddin Housing Association
Holiday Total this Year	238
Holiday Taken this Year	38
Holiday Remaining	200 (excluding this request)
Date From	20/02/2019
Date To	20/02/2019
Work Pattern (Hours)	
Mon	7
Tue	7
Wed	7
Thu	7
Fri	6.5
Sat	0
Sun	0
Duration	7
Absence Type	Holiday
Absence Reason	Authorised Leave
Half Day Start	No
Half Day End	No
Line Manager	Layton, Rhian (9)

- [✓ Approve this request](#)
- [✓ Approve this request with a message](#)
- [✗ Decline this request](#)
- [✗ Decline this request with a message](#)
- [📅 View the Absence Calendar](#)

At the bottom of the email, you will have the above options.

To view who else is away from the office you select the 'Absence Calendar' which will take you to the group calendar that was mentioned above.

You will also receive emails to approve absence cancellation requests.

The employee will receive an email once you have approved or declined the request.

FAQ – Cascade Go

How will I work out my new leave in hours?

For all staff, the most noticeable change is the fact that your entitlement is now in days. This had to be amended, as we introduced a TOIL system and both systems had to be in either days or hours. As you can see, when selecting your leave, the system has already been set up with a work pattern for you. You select the days you need to take and this will calculate the number of hours you will need to take.

Full day – 7 hours (6.5 Friday)

½ day – 3.5 hours (3.25 hours Friday)

Our new system is in days but we will continue utilising the above system of only booking half and full days and utilising TOIL for anything less than this.

How much TOIL can I take?

TOIL can only be taken or earned for 15 mins or more. For anything less, this can be deducted from a lunch hour or working on to make up for it.

How will I know if my leave has been approved?

You will receive an email confirmation that it has been approved by your line manager and the request on Cascade GO will move from pending to approve.

What if my line manager is on leave?

Realistically, leave should always be pre-booked, but if your line manager is away from the office for over a week, we are able to redirect your requests to an alternative person for a certain period of time.

What if I want to cancel my leave?

You click the approved entry and send cancellation to your line manager. They must approve the cancellation. If the date has passed, HR can delete this entry for you.

Can I update my contact details?

For the tabs that aren't highlighted, you are able to update these contact details to ensure that they are current to you. Anything to do with your contract, HR will have to change these for you.

What if I go part-time or full-time?

For any staff member that have a change in their working hours, HR is able to amend their work pattern from a certain date and change their A/L entitlement to reflect this.

Can I book leave for next year?

To book leave ahead, just type in the dates that you require, and these will go sit in next year's calendar, in preparation for the new entitlement.

Group calendar

All departments will be able to see their specific group on the calendar to view who is in and out of the office. They are colour categorised i.e.

TOIL – pink

Holiday – blue

Appointment – green

What if I take TOIL and Holiday in the same day?

As informed by Cascade GO, holiday trumps all other absence reasons. Therefore, if you record a holiday on 01/01/19 then no other absences can be recorded on that day. Although, if you record TOIL first on 01/01/19 and then holiday, it will accept both.

How much information should I log with an appointment?

On the system, you're only able to select a medical or dental appointment. In the working pattern box, select the number hours that you will be away from the office and advise in the comments the time that you will be leaving the office i.e. Appt at 14:30. Its recommended good practice that medical appointments be booked for first thing in the morning or late in the afternoon. It is understandable if it is an emergency appt or certain times for clinics.

Will I know if my absence request has been approved / declined?

Yes – you will receive an email confirmation with the line manager having an option to explain why. It will also appear on the cascade go portal under its correct status.

Who will I receive the absence email requests from?

Bro Myrddin Housing Association – Absence (email@cascadecloud.co.uk)

Can I cancel my leave if I was off sick instead?

Once the date has passed, you're unable to cancel your leave yourself, but HR would be able to go into your account and delete.

Do I still need to put my absence requests in my outlook calendar?

Yes – cascade Go will not filter into Outlook and you will still need to put it in your personal calendar.

Lowri Davies

From: Samantha Fell
Sent: 01 August 2019 11:11
To: Lowri Davies
Subject: RE: Bradford Score

Follow Up Flag: Follow up
Flag Status: Completed

Diolch Lowri

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

From: Lowri Davies
Sent: 01 August 2019 11:09
To: Hilary Jones ; Rhodri Jones ; Tracy Rees ; Mathew Davies ; Matt Allen ; Clare James ; Paul Edwards ; Rhian Layton ; Samantha Fell
Subject: Bradford Score

Hi all,

Following the last management team meeting, I can confirm that the Bradford score for sickness absences has been hidden from the main dashboard from all employees.

Many thanks,
Lowri

Management Team Meetings Actions

Last updated 28/10/2019
By Rhodri Jones



Meeting date	Agenda item.	Meeting notes	Actions	Resp. Person	Target Date	Comp. Date	Comments
23/07/2019	Matters arising	EMTP 07/05/19 - 20 EMTP 19 (Financial Performance)	Budget report on staff portal to be archived weekly and saved in an accessible folder	ITPM	30/09/2019 31/01/2020		Development complete, delegated authorities to be entered by Finance. Target date moved to 30/11/2020 (by RJ on 28/10/2019)
		EMTP 07/05/19 - 25 EMTP 19 (Service Standards)	Submit Service Standards to Residents Forum for review	HSM	31/03/2020		Will be an agenda item on the next residents' forum (Oct 19)
		EMTP 07/05/19 - 16 EMTP 19 (Business Plan & Exceptions)	Prepare for next phase of resident profiling information with STAR Survey	DoOp/OM	31/03/2020		New questions to be published by WG in January.
		EMTP 01/11/16 - 48 EMTP 16 (Community Benefit)	Trial HACT Toolkit	ITPM / Hsg	Action on hold	On-hold	Due to workload ITPM has not been able to undertake trial. Extension requested to 31/7/17 was approved at EMTP meeting in May 2017.Request to put this action on hold while discussions ongoing with UWTSD. RJ 28/10/2019 - suggested to sector that this gets looked at as part of CHCs work in to VFM metrics
23/07/2019	Corporate Plan	Plan had been created in line with discussions held with staff during planning away day in Sept-18. DoCR would like plan to be shorter and for staff to easily recognise their contribution. In future, it was agreed that the plan would be launched through workshops to staff.	Incorporate corporate plan into operational plans and share with employees during team meetings	Managers	30/09/2019 On-going		
			Consider launching future corporate plan for all staff through workshops	EMT	31/12/2020		
23/07/2019	Q1 Performance	Provided an overview of key areas Stats were time consuming to gather. Measures would be continuously reviewed over months/years to ensure that they were relevant and beneficial. FM shared that finance department would be producing monthly reports on statistics that they believed would be useful. Affordability is a key theme and the association recognising what this means to them. Welsh Government have not launched their 5-year Rent Policy Plan and is now closed for recess. High priority around low carbon with new developments. Acceptable fails have reduced due to WG changing categorisation. Level of void rechargeable costs raised and report of less engagement with residents at pre-void appointments. Canfod cartref progressing well with bids being received on each void property submitted. ASB Management system contacts are not being received through contacts parameterised report and missing in engagement levels.	Meet with ICT to consider how much stats and reports can be automated	Managers/ ICTPM	31/12/2019		No requests as yet.
			Review TP strategy in line with Welsh Government 'The Right Stuff'	HSM	31/03/2020		
			Suggest planting trees to lower carbon footprint for new developments	PSM	31/03/2020		
			Consider joint approach with CCC for approaching bailiff issues	HSM	31/12/2019		Emailed Rhys Bowling and Aled Williams in relation to this. They have also had problems with the same issue at the beginning of the year but everything is fine now.
			Agile working group to meet and discuss moving ASB Management system into QLx	Working Group	31/03/2020		
			Promote 'you said, we did' and consider TPAS approach of changing the wording to include 'listen'	OM	31/12/2019		
			Add performance measures around Mental Health hostel	DoOp	31/10/2019	On-hold	Assessment on value of including such measures to be undertaken post transfer to new independent service delivery methodology.
23/07/2019	Risk	DoCR went through each risk on the strategic risk register and ensured that all strategies were current from all present.	Rent Setting Policy to be reviewed after Affordable Housing Review	EMT	On-going		Rent Setting Policy report being submitted to Board on 19 August 2019. Rent Setting Task & Finish Group met on 4 & 25 November 2019.
			Awareness training for all staff around Financial Regulations	FM	31/12/2019		Training held with CST on 07/08/19
23/07/2019	H, S & Wellbeing	Update from previous Health, Safety & Wellbeing meeting. Two current open insurance claims. 12 of 14 claims since 2013 have been dealt with due to the amount of notes and information logged on CRM. Discussion around wellbeing and what it meant to the organisation. DoCR highlighted that information doesn't need to come directly from EMT.	Promote the good things that the association do	Managers	On-going		
			Make a wellbeing calendar of events i.e. organised every month/bi-monthly by different depts.	HRM	31/03/2020		
23/07/2019	Data Protection	DoCR provided an overview of where the association currently stood.	Chase Data Sharing Agreements	All	On-going		

Meeting date	Agenda item.	Meeting notes	Actions	Resp. Person	Target Date	Comp. Date	Comments
		Arawak closing their UK operations and going internationally.	Managers to agree which reports they'd liked to be stored in the All Staff folder	Managers	On-going		At 23/10/2019 meeting, it was agreed that this folder was to be used for multi-user documents to be stored...source individual will need to protect the spreadsheet as necessary to ensure no erroneous changes are made. This is an evolving task and target date duly amended on 28/10/2019 by RJ
23/07/2019	Absence	At the meeting, managers had the opporutnity to share feedback on the implementation of the Cascade GO system. All present confirmed that they hadn't had any concerns or negative responses during their performance meetings but two managers had received verbal discussions around the 'Bradford Score' Employees were concerned with the high level of implementation and if this would effect their employment. The DoCR confirmed that this isn't considered as part of the Absence Management POlICY and would ask for it to be removed.	To remove bradford score	CRM	31/07/2019	01/08/2019	Removed an an email sent to Managers
23/07/2019	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	On-going		CR meeting held on 13 September 2019. Full CRD meeting held on 23 October 2019. Full Operations department meeting 23rd October and each team also hold team meetings.
			Following quarterly performance measures report meeting, this feedback to be passed back down to employees at next team meeting.	Managers	On-going		
			Managers to monitor concerns and negative comments from employees on a daily basis and deal with informally as soon as possible.	Managers	On-going		
23/07/2019	Performance Appraisals	Performance Appraisals to begin with CEO -> EMT -> Managers -> Employees to cascade down corporate priorities and feed into budgets for next financial year. Beginning from November and end in January.	Line Managers to arrange appraisals following their own initial appraisal.	Managers	31/01/2020		PA meetings arranged for EMT early October 2019. CR Managers' completed. CR scheduled on 17/12/19.

Team Briefing Paper – March 2019

Corporate Resources

IT Strategy: The new IT Strategy for 2019/20 has been approved by Board and is now available for Staff to review. Our Strategy is primarily centred around Cloud Services/Agile working, Integrated systems, Security and Business Intelligence. Can all staff please take some time to review this document, which is available on the Intranet.

Contractor Portal: An updated Contractor Portal is currently being designed and will have a similar setup to that of the Staff Portal. This will also provide opportunity for enhancements and for the introduction of innovative new features.

New Server: A new server will be implemented shortly, the specification of this new server will allow for additional resources to be provided to the QL system – this performance gain should be reflected in areas such as the client search in CRM and across the system.

Staff Portal / Intranet: As you will have noticed, there is now very little content on the old Intranet, these last few remaining policies and procedures will also shortly be moving to the Staff Portal, at which point the Intranet will be turned off. Some additional features added to the Portal recently include:

- Contracts Register – Development add-in
- Community Benefits register
- Room planner/scheduler
- Departmental plans.

Resident App: We are still seeking Residents who wish to take part in a trial of the new Bro Myrddin Resident App, so far numbers of interested parties have been a little low, can we please discuss this with Residents where possible and see if we can increase the number interested In this exciting trial.

2019-20 Budget – The 2019-2020 Budget was approved by the Board on Monday, 25 March 2019.

Cascade GO- since 1 March 2019, the new leave system was introduced for all staff to be able to use on every device any time of day. Since its implementation there have been a few minor queries raised which have been dealt by Lowri and the support of the system administrators. The main areas were

- Annual Leave and other absences can be booked on the same day but other absences must be inputted on the system first.
- Half days for Mon-Thursday are 3.5 hours, Friday is 3.25 hours.

If you do have any further queries, please forward them directly to Lowri or speak with your line manager.

Staff Training days – Should anyone have any specific topics and/or suggestions for staff training days please can you notify Lowri.

The Housing & Customer Services team will be attending training on ASB Masterclass on 10 April 2019 facilitated by HQN.

Management Development Programme: Senior Managers and Managers will commence the Management Development Programme facilitated by Andrew

Wallbridge of TSW. The training is a 6 day programme which will be completed during July – October 2019.

Small Workplace Health Award: Rhian Parry of Public Health will be meeting with the Health, Safety & Wellbeing Strategic Group on 2 April 2019 in relation to our Gold Award.

Key Holding Services - It is confirmed that the Association's Key Holding Service for head office has been awarded to Nite Lite Security Limited from 1 April 2019 – 31 March 2020.

Investors in People: Jill Davies, of Investors in People visited the Association on 8th March to carry out our 12 month review. Next review scheduled in February 2020.

Suggestion Box: Since the New Year EMT have received the following suggestions:

- a) Another Interview Room – usage of interview room to be monitored over the next couple of months. In the meantime, the Association will get a quotation for a Portable Panic Alarm in order that the Quiet Room and Meeting Rooms upstairs could be utilised when required;
- b) Table Tennis table for the Board Room – to be discussed further at the next HS&W Strategic Group;
- c) TV Screens for each floor – Staff Portal currently being developed and various information would be made available on the Staff Portal in due course.

Housing Services

Choice Based Lettings (CBL) – Canfod Cartref: 'Go live' on the new system commences this week. Properties which are currently unallocated and future void properties will be advertised via the new bidding system. Anyone enquiring about our properties must be on the Housing Register in order to bid. The bidding cycle is weekly, commencing on a Friday AM and ending on the Monday PM.

Universal Credit: We currently have 54 residents on UC. This figure rises weekly with a steady flow of new cases coming in through the Landlord Portal. Carmarthenshire CAB have started a 'Help to Claim' service and welcome self-referrals from UC customers who need digital support to make their claim and maintain it up until the first payment is received. To refer people can either telephone: 07740 945348 or email: uc@carmarthenshire-ca.org.uk

Rent Increases: Thanks to everyone who helped with this year's rent increase notifications. The Housing team has updated residents' Direct Debits with the new amounts for 2019/20. This year is a 53 week year so please remember this when setting up new DDs. During the first week of April we will need to update the contribution splits on CRM. We are awaiting information from Housing Benefit in relation to new HB entitlements from April 2019.

Property & Customer Services

Estate Walkabouts: Operational managers recently met to review what outcomes we are hoping to achieve out of one of our main forms of engagement through the year. The Estate Walkabouts schedule now targets all sites so we won't be knocking

everyone's door but targeting those we might not have otherwise engaged with. The following outcomes were agreed:

- Engagement with those who we've had no recent contact with
- To complete an estate walkabout form (includes questions on where they live, being a resident with us, do we listen, how could we do better and how to get involved)
- Access to homes we haven't been into recently (find the sauna's...)
- To get all profiling forms completed
- To collate a record of the engagement and access
- To ensure the site is safe by completing a site inspection form
- To promote digital means of engagement and self-service opportunities through social media, website and new app.

We are visiting 56 schemes over the next 12 months and a new poster is under development instead of the lengthy letter and the schedule is to be put on the website.

Repairs Orders – can we do less? It's been a really busy year, in relation to the number of orders we've raised, processed and paid. Therefore, Paul, Matt, Mathew and Tracy met to challenge how we raise orders and to ensure we're meeting our financial, future planning servicing and planned maintenance commitments. Some changes agreed are as follows:

- We can raise single orders in place of contracts (where there is no servicing or planned maintenance component required) such as grounds and cleaning contract. This for those examples will reduce orders from 60 to 2.... You can also do this for things like gritting, so where multiple orders are being raised against different communal areas. In due course a new property code will be raised to help keep these type of orders together.
- Invoicing – contracts where we have to raise multiple orders can be invoiced monthly, i.e. for gas servicing instead of one invoice per order, so 12 invoices instead of 380...

If you have an ideas of things that can be consolidated in this way please share with your line manager.

Development

New build – Total value of build contracts £10.7 million, with 89 units on site:

- **Priory Street (37 units - 10 houses, 27 flats)** completion date set as 28th February 2020. The majority of bases have been completed and timber frames erected to the 10 houses and well underway for the front block of 15 apartments. Roofing works and window installations are complete to the 10 houses to the rear. Electrical and plumbing works, plaster boarding and installation of staircases are ongoing as are the installation of PV panels to the roof slopes. Drainage works are underway.
- **Gate Road, Penygroes (8 units - 8 houses):** completion due mid- August 2019. Roofing work, external blockwork, external rendering and window installation is complete to all units. Internal plastering is substantially complete and kitchen and bathroom installations and mechanical and electrical installations are well underway.
- **Maes y Bryn, Llangennech (34 units - 26 houses, 8 flats):** Works progressing well with completion targeted as 28th September 2019. The estate road now constructed to base course level and retaining structures

and below ground site drainage are substantially complete. The installation of timber frames and roof trusses is well underway with roof coverings completed and window installations completed to some units. Plaster boarding and skimming to walls and ceilings is underway to a number of units as are the mechanical and electrical installations.

- **Cwmgwili (10 units – 10 houses):** We have entered into contract with Morgan Construction for 10 houses (8 x 2bed and 2 x 4 bed) with completion due March 2020. Works have commenced on site. We have decided on a name for the site which is Coed y Dderwen.

Early in May we'll be looking to set up a small working group to help prepare for the handover of Maes Y Bryn (34 homes in September) and Gate Road (8 houses in August). If anyone is keen please let your line manager know.

Glannant House refurbishment: Works now progressing well after delays with the top render coat due to wet weather. Completion targeted for 7th June 2019. Scaffolding has been removed to the rear block and work has commenced on the last block.

103 Brynyfryd, Llangennech: Contract with M Hiorns Building Contractor Ltd for an adaptation extension commenced on site in January. Works progressing well and anticipated to complete mid May 2019.

Purchase of existing properties: Purchase of four completed (5 Heol Beca, 8 Bryn Gorwel, 5 Cae Grug and 11 Cae Eithin - all Carmarthen) with a further two due to complete before the end of March (11 Clos Gwili, Cwmgwili and 11 Glasfryn, St Clears). We are in the process of purchasing a further one (18 Beech Road, Carmarthen) which is due to complete in July.

Works to existing properties: Works have completed to 5 Heol Beca and should be complete by the end of the month for 5 Cae Grug and 8 Bryn Gorwel. The works to 11 Cae Eithin and 11 Clos Gwili should commence early April with works to 11 Glasfryn likely to commence mid April.

WHQS Surveys: We are currently on target to complete 80% of the re-surveys by the end of March. The remaining surveys will be completed in-house by the end of March 2020, we will, by then have no survey information older than 5 years. A programme has been compiled to ensure that the minimum number of surveys are completed annually, ensuring that our asset information remains accurate and relevant.

Kitchen and Bathroom Replacement Works: We will be replacing 46 kitchens and 28 bathrooms. We have completed 34 kitchens and 27 bathrooms to date. The contractor has reallocated additional resources to help complete the outstanding kitchens, prior to the end of the year.

Compliance

Fire Risk Assessments: All of our communal areas have now been assessed for fire safety, except Glannant House, which will be completed by the end of May once the major refurbishment works are completed. The risk assessments and any subsequent actions will be supplied within the next 2-3 weeks, all actions identified will be addressed within the recommended timescale.

Fire Authority Inspection: A routine fire safety check was also undertaken on the 12th March by the fire officer from the Mid and West Wales fire service on 7 schemes around Carmarthen, a report of his findings will be forwarded in due course. The fire officer was accompanied by a member of staff and no items of concern were mentioned during the visit.

Electrical Testing: It is planned to tender a contract for the ongoing compliance requirements for the fixed electrical testing. The electrical works will be scheduled and managed in the same manner as the current gas servicing process. There will be agreed costs for all related activities, helping to manage costs and demonstrate value for money.

Gas Servicing: We will be adopting the 'MOT' style gas servicing model from 1st June this financial year, there are both cost savings and added flexibilities within the new approach. Bro Myrddin are pioneering this new process at the moment with a number of similar organisations looking on with interest. Appropriate system changes have been made in QL and on the contractor portal and Westward have amended the process at their end to include the additional date requirement on the gas certificate.

Cyclical Painting Programme: All 43 properties have now been completed, we have received a number of positive conversations with the tenants affected by the works. We also have copies of the customer satisfaction feedback provided directly to the contractor for information.

Customer Services

Ongoing tasks: CST are currently updating QL with NI Numbers to support the work of the Housing Services Team (in particular for UC purposes). A new set of team and individual measures developed and agreed to enable the team to have a more holistic approach to support the Association.

Resident's Fun Day: Plans for the event are progressing. Risk assessment have been undertaken. Contractors have been contacted and donations are starting to come in. Stall holders have been invited to attend.