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Statement of Authenticity

Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to Coaching and Mentoring in the Workplace

Word Count: 3194

Student Name: Ruth Taylor

Student Number: 1906248

CIPD Membership Number: 55478664

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed:

A handwritten signature in black ink that reads "Ruth Taylor". The signature is written in a cursive style with a large 'R' and 'T'.

Date: 14th March 2021

Evidence Matrix

Candidate name: Ruth Taylor				CIPD Membership/registration No. 55478664		
Qualification title: CIPD Diploma in Applied Human Resources				Unique Learner No. (ULN): 1906248		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5ADCM	Contributing to coaching and mentoring in the workplace	1.1	Notes from meeting with Learning and Development Practitioner to discuss organisation's approach to coaching and mentoring	Ev1		
5ADCM	Contributing to coaching and mentoring in the workplace	1.2	HEIW's Values Based Performance Appraisal and Development Review (PADR) form.	Ev2		
5ADCM	Contributing to coaching and mentoring in the workplace	1.2	101 coaching questions that can be used to support PADR process	Ev3		
5ADCM	Contributing to coaching and mentoring in the workplace	1.3, 1.4	SWOT analysis of HEIW's approach to coaching and mentoring	Ev4		
5ADCM	Contributing to coaching and mentoring in the workplace	1.3	Culture levels in legacy organisations and the current organisation and desired organisation culture states.	Ev5		
5ADCM	Contributing to coaching and mentoring in the workplace	1.3	Screen shot of results from NHS Wales staff survey relating to teams taking time out to reflect.	Ev6		
5ADCM	Contributing to coaching and mentoring in the workplace	2.1, 2.2, 2.3, 2.4, 2.5	Notes from meeting with Learning and Development Practitioner detailing discussion on contributing to coaching and mentoring in HEIW and agreed actions.	Ev7		
5ADCM	Contributing to coaching and mentoring in the workplace	2.1, 2.2, 2.3, 2.4, 2.5	Coaching and Mentoring Presentation	Ev8		
5ADCM	Contributing to coaching and mentoring in the workplace	2.2	Coaching and Mentoring Contract	Ev9		
5ADCM	Contributing to coaching and mentoring in the workplace	1.1, 2.3	Notes from meeting with Assistant Director of Organisational Development detailing discussion on approaches to coaching and mentoring.	Ev10		

5ADCM	Contributing to coaching and mentoring in the workplace	2.4	Reflective statement on my role as a peer mentor.	Ev11		
5ADCM	Contributing to coaching and mentoring in the workplace	2.4	Feedback received on support provided as a peer mentor	Ev12		
5ADCM	Contributing to coaching and mentoring in the workplace	2.5	Copy of survey developed to measure effectiveness of coaching and mentoring training	Ev13		
5ADCM	Contributing to coaching and mentoring in the workplace	2.5	Copy of skills gap analysis survey to identify potential mentors.	Ev14		
5ADCM	Contributing to coaching and mentoring in the workplace	2.1, 2.2, 2.3, 2.4, 2.5	Confirmation email that my contribution to coaching and mentoring in the organisation has been effective	Ev15		
Candidate declaration:						
Signature:					Date:	13th March 2021

Contributing to Coaching and Mentoring in the Workplace

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

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

A colleague and I met with Jeremy Ashdown, Learning and Development Practitioner to understand Health Education and Improvement Wales' (HEIW) approach to coaching and mentoring (Ev1). HEIW is a relatively new organisation and does not yet have a formal coaching and mentoring programme in place. However, this area is moving at pace, particularly as a training needs analysis identified coaching and mentoring as a gap in the organisation's L&D offering. The organisation is currently working towards the development of a People & OD strategy, as set out in objective 5.1 of HEIW's (2020) Integrated Medium Term Plan (IMTP), within which a formal coaching and mentoring programme offering will be included.

With the amalgamation of three legacy organisations came already qualified coaches and mentors who can support HEIW employees as well as NHS Wales employees. HEIW also has access to external coaches and mentors, which are provided free of charge by Academi Wales, the Centre for Excellence in Leadership and Management for public services in Wales.

The organisation is currently supporting three cohorts of staff to undertake an ILM qualification in Coaching and mentoring at levels 3, 5 and 7. This will increase the number of coaches and mentors available to staff both within HEIW and across NHS Wales. Staff who undertake this course do so with the expectation that they will join the NHS Wales pool of coaches and mentors and commit to providing a minimum amount of hours per quarter to supporting colleagues across NHS Wales.

There are also some informal mechanisms in place, including a new starters group and a peer support group within the Workforce and OD Directorate. This provides staff with a safe space to talk through any issues they have, either personal or work related, with other colleagues and identify solutions.

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

The appraisal process within HEIW is based on a coaching model, whereby staff are encouraged to reflect on their achievements over the previous year and identify any difficulties they encountered. This is supported by the HEIW Values Based Performance and Development Review form (Ev2) which is shared with staff in advance of meeting with their line manager to discuss their progress and future aspirations. The process is also supported by a list of 101 coaching questions that managers can use to aid appraisal discussions with staff (Ev3). This is supported by Cronin (2019) who states that coaching and mentoring techniques should be used throughout the organisation. Their use in the appraisal process supports the learning and development of individuals and encourages personal growth. Employees who feel in control of their own learning and development will perform better, in turn having a positive impact on team and organisational objectives.

Coaching techniques are also used to support the health and wellbeing of staff. Strategic Aim 5.2 of HEIW's (2020) IMTP refers to the organisation leading, developing and embedding a range of actions

to support workforce wellbeing. NHS Wales has a Managing Attendance at Work Policy (NHS Wales, 2018), which takes a proactive approach to managing employee health and wellbeing. This involves using a coaching approach to encourage individuals to explore options and encourage them to take ownership for their own health and wellbeing enabling them to contribute positively to the organisation. Merrick (2020) supports this approach, particularly during COVID times, where a more holistic approach to coaching and mentoring is recommended, enabling employees to manage both their work and personal life.

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

A colleague and I undertook a SWOT analysis (Ev4) on the organisation's approach to coaching and mentoring to enable us to identify some of the factors that could impact on the future development of our programmes. A number of weaknesses were identified with the current offering, the most significant being that the benefits and opportunities for accessing coaching and mentoring and opportunities to become a trained coach or mentor are under promoted within the organisation. Prior to meeting with our Learning and Development Practitioner, I was not aware that the organisation had a coaching and mentoring offering and I am sure this is the case for a significant number of staff within the organisation.

Coaching and mentoring is already used to support policies within the organisation, including the annual appraisal process and the Managing Attendance at Work Policy. It should be highlighted to staff that the organisation is already using these techniques and how they are contributing to organisational success. This is a missed opportunity to highlight the benefits associated with this approach and enabling employees to understand how they are already using these techniques will encourage them to be more receptive to its further implementation.

A significant barrier to staff accessing coaching and mentoring opportunities is that there is no reference to them within any of HEIW's workforce policies. The Values Based Performance Appraisal and Development Policy (HEIW, 2019), Capability Policy and Procedure (HEIW, 2018) and Access to Learning and Development Policy and Procedure (HEIW, 2020b) do not reference coaching and mentoring. Whilst from my own investigatory discussions coaching and mentoring activity is happening, its availability is not clear and therefore staff will not be aware of the opportunities they have to access or support the service.

Another significant barrier is HEIW's culture. Whilst the culture is generally good, there are pockets whereby issues relating to trust have been highlighted, supported by the recent NHS Wales Staff Survey, alongside internal pulse surveys and health needs assessments. The culture of the organisation is further impacted by the differing terms and conditions amongst staff, with HEIW being formed by the amalgamation of three legacy organisations. Culture assessments carried out in 2018, prior to amalgamation, demonstrated a difference in organisational culture across the three organisations (Ev5) and highlighted the significant gap between the culture at that time and the ideal culture that staff wanted to achieve, with employees reporting the use of task orientated aggressive/defensive styles and security needs approaches. Whilst constructive techniques were used, there was still room for improvement. The black mark in the centre of the wheel demonstrates the 50% centile. Anything above this is likely to show a noticeable culture norm. The cultural styles being used would demonstrate that the culture would need to improve before a coaching culture could be embedded. The exercise is due to be repeated shortly to enable the organisation to understand if and how much the culture has improved. This will help inform how receptive employees are to embracing a coaching and mentoring culture.

Another identified barrier is time available to provide coaching and mentoring. The NHS Wales Staff Survey carried out towards the end of 2020 highlighted that only 67.5% of HEIW respondents took time out to reflect and learn (Ev6). Whilst this figure could be related to the impact the COVID pandemic has had on workloads and organisational priorities, it will be important to identify and promote dedicated time for teams to reflect together on their priorities and achievements and continue to build on this once operational activity begins to return to normal. Harvard Business Review (2015) emphasises the importance of investing time in the development of people and how it is an essential activity. Therefore, there is significant value in the organisation taking positive steps to encourage teams to take time out.

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

Through carrying out a SWOT analysis (Ev3), we were also able to identify opportunities to develop the coaching and mentoring offering within HEIW. The most significant area for development is in the promotion of coaching and mentoring, what it is and isn't, the benefits associated with it and how HEIW is already applying these techniques in its policies and processes to good effect. There is also value in promoting the opportunities available to staff, both in relation to being a coach/mentor and a coachee/mentee. Access to external coaches should be promoted as this may encourage more staff to access this learning activity, tackling the issue with pockets of distrust in the organisation. HEIW is developing a People and OD Strategy and my recommendation would be that coaching and mentoring opportunities are promoted clearly within the finalised document.

A significant amount of work is being done to build on HEIW's culture, with the results of the most recent NHS Wales survey, *Our Reflections, Our Decisions, Our Future* (HEIW, 2020c), being used as a conversation starter within individual teams. The approach is different to previous surveys in that the responses are fed back to individual teams within organisations for them to take responsibility for making positive change rather than the executive and senior managers making the decisions. The approach encourages teams and individuals to participate in discussions, feedback and discuss their reflections with colleagues and then make localised decisions. This is one of the steps HEIW is taking to move towards a coaching culture, by encouraging teams to take responsibility for making positive change in a way that is appropriate for their individual circumstances. There is therefore value in developing resources, information and providing support to line managers and their teams to feel confident and comfortable with having coaching conversations, enabling them to apply the techniques to wider aspects of the business.

LO2. 2. Be able to support the implementation of coaching and/or mentoring programmes within an organisation

A colleague and I met with our Learning and Development Practitioner to identify how we could contribute to coaching and mentoring in the organisation to meet our CIPD objectives as well as add value to the organisation. Ev7 is a summary of the discussion and the actions agreed.

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

Coaching and mentoring can bring many benefits to an organisation as well as to the employees themselves. Before being able to promote the benefits, we felt it important to think about the barriers that exist to implementing the concept successfully in the organisation. The most significant barrier was that employees do not know what coaching and mentoring is and hold many misconceptions about it. Therefore, we thought it important that these barriers were removed and we tried to bust any myths that individuals have. Ev8 (slides 2 & 3) aim to provide a succinct overview of what coaching and mentoring is and what it isn't. Having spoken to colleagues, one of the main misconceptions was that this approach was about showing or telling someone how to do something. We therefore felt it important that the difference between this concept and one to one training was clarified. Agarwal (2021) describes one to one training as a knowledgeable individual facilitating the learning of another in a specific task where, in contrast, coaching and mentoring is about helping an individual to learn and think for themselves (Gallway, 1975).

We were then able to introduce the benefits of coaching and mentoring. Ev8 (slides 4 – 7) demonstrate how the benefits can contribute specifically to HEIW and its employees. Merrick (2018) and Mindtools (2021a) describe many benefits to coaches/mentors, coachees/mentees and the organisation including improved teamwork, increased productivity and performance, innovation and development of interpersonal skills. These benefits support HEIW's values, together as a team, respect for all and ideas that improve (HEIW, 2018). Presenting these in a way that clearly links back to our values, will help employees really understand the benefits this approach can bring to organisation success and achievement of its objectives (Ev8, slide 7). We were also able to include quotes from individuals undergoing the coaching and mentoring training programmes and the benefits they had already gained from its use (Ev8, slide 6). This approach is similar to what Kotter.com (no date) refers to as a guiding coalition. The quotes have come from influential people within the organisation, including the Assistant Director for Leadership and Succession and Head of Health and Wellbeing and will help to bring about change to our approach.

Another significant barrier is the organisational culture. Whilst this has improved considerably since HEIW was formed in 2018 (Ev5, slides 12 & 13), it has not been officially re-evaluated so it will be important to identify whether the interventions that have been undertaken, including numerous staff events, pulse surveys, the development of the Workforce Strategy for Health and Social Care (HEIW, and Social Care Wales, 2020) and the signing of pledges related to equality and mental health, have had enough positive impact to enable coaching and mentoring to be embedded.

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

Coaching and mentoring contracts are an important part in coaching and mentoring processes. They are a legal document which confirms the boundaries of the relationship between the coach/mentor and coachee/mentee (Seeley Harris, 2013). Coaching Focus (2021) emphasises important elements that should be included in every contract, including the purpose of the coaching programme, the parameters of the psychological relationship between both parties and the logistics and processes that underpin the relationship. With this in mind, we reviewed both the Wales Public Service Collaborative Coaching contract (Welsh Government, no date) alongside a bespoke personal contract used by an Academi Wales qualified coach (Moore, J, no date).

Our newly developed contract (Ev9) sets out the recommended parameters and brings them in line with HEIW's values and behaviours. It clearly outlines the parameters of the relationship and sets clear expectations from both parties. It also highlights the reasons by which the contract can be

terminated by either party. Personal coaching information.com (2021) highlights potential reasons for termination of contract including lack of engagement from the coachee, insufficient rapport leading to a breakdown in the relationship or insufficient commitment from either party, i.e. failing to meet objectives, failing to attend appointments.

This newly developed contract can be used by the coaches and mentors once they complete their training and ensures all elements and expectations of the relationship are clearly set out before any commitment to pursue the relationship is made.

Our presentation also explains the processes and interventions that can be used to manage relationships within the organisation and how coaching and mentoring techniques can be used in the first instance to manage a difficult relationship (Ev8, slide 23).

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

To understand how we could support coaches and mentors to develop their skills, knowledge and behaviours my colleague and I met with James Moore, Assistant Director for Organisational Development and a qualified coach working with Academi Wales (Ev10). He explained some of the key principles behind being an effective coach as well as how he is leading on work across NHS Wales, by encouraging the use of coaching techniques to build healthy working relationships. He explained how the main behaviours to be embedded into all relationships across NHS Wales is to pause and breathe, listen and ask questions and be kind and helpful. These behaviours are supported by HEIW's Compassionate Leadership Principles (Ev8, slide 16), developed with support from Michael West from The Kings Fund who describes compassionate leadership as:

- Paying attention and listening with fascination to staff
- Appraising the situation
- Displaying empathy
- Taking intelligent action

West (2015)

Whilst employees of HEIW should always display the behaviours set out in their agreed values and behaviours pledge (HEIW, 2018), there are some that are particularly important when it comes to being a coach or mentor (Ev8, slide 17).

Our presentation also highlighted the key skills required to be an effective coach and we have demonstrated how they are underpinned by both compassionate leadership and our required behaviours (slide 20, Ev8).

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

A new member of staff was recently appointed to my team and I was asked to be an informal peer mentor to her to help her learn about her role and the wider organisation and feel supported. Peer mentoring is described by Art of Mentoring (2021) as a relationship between individuals of similar age or career stage, where one is more experienced than the other in a particular area. This was very much the case as I have over 20 years' experience within the NHS, 2 ½ of which have been in HEIW. I took an informal approach to this by doing what is suggested by Muruga (2017) as carrying out

regularly check ins and informal one to one meetings. Ev11 is my personal reflection of our initial relationship and the support I provided and how it has now become a reciprocal mentoring relationship. Reciprocal relationships are recommended by NHS England (2014) with the purpose to share knowledge and skills for mutual benefit. Ev12 is the feedback received on the support I provided.

Following our investigatory conversations on how coaching and mentoring techniques could be used to build a coaching culture, we worked together to develop some resources (Ev8, slides 24- 29) to support line managers and employees to have open conversations with their teams, beginning with reflecting on the results of the recent NHS Wales staff survey (HEIW, 2020c). This approach encourages teams and individuals to participate in discussions, feedback and discuss their reflections with colleagues and then make localised decisions and take responsibility for making positive change in a way that is appropriate for their individual circumstances.

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

There are 3 cohorts of staff who are currently undertaking an ILM qualification in Coaching and Mentoring. We therefore felt it important that, once training was completed, we captured their experiences and how it has impacted their understanding and ability to provide this service. We therefore developed a survey (Ev13) around Kirkpatrick's Four-Level Training Evaluation Model (Mindtools, 2021b), with the aim to assess reactions, learning, behaviours and results, with some of the key questions relating to whether the training was successful, what they found most useful, were there any gaps and, most importantly, whether they had the confidence to fulfil the role going forward. Once the staff have completed their training, this survey will be shared with them and the results reviewed to inform training for future cohorts.

There is a lot of untapped talent within HEIW. Staff have extensive workplace skills and expert knowledge in a range of subjects. To build on the organisation's values, together as a team and ideas that improve, and to support the development of the People & OD strategy and learning and development plan, we designed a skill gap analysis survey that would capture individual skill level across a range of workplace skills (Ev14).

A skill gap analysis is used to identify the gap between the current situation and the future aims of the business (Verlinden, no date). It is used to identify the skills that are needed in the business, but are not necessarily readily available. It can also help with succession planning, ensuring required skills remain in the organisation.

The purpose of our survey was to identify where the gaps were and identify staff who could help bridge the gap by applying mentoring techniques. This would be of benefit to all staff as learning and development opportunities would be available to all, either by learning new skills or sharing knowledge. Human Factors International (no date) provides an excellent example of teaching knowledgeable staff to share information with others, ensuring it remains in the organisation and contributes to organisational success.

One of the main skills required of a mentor is organisational know-how (Manchester Metropolitan University, no date). Carrying out this survey will help us identify these individuals and offer them the opportunity to develop the skills required to be an effective mentor, in turn supporting the development of an internal mentoring programme. This programme could be supported by the slides

developed (Ev8), to ensure those on the programme understand all the essential information related to mentoring in the organisation.

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**Notes from meeting with Jeremy Ashdown, Learning and OD Practitioner, HEIW
Organisation's approach to coaching and mentoring**

Thursday 4th February 2021

Present:

Jeremy Ashdown, Learning and OD Practitioner (JA)
Emma Carrington, Health and Wellbeing support officer (EC)
Ruth Taylor, Careers and Widening Access Advisor (RT)

RT and EC asked to meet with JA to understand the organisation's approach to coaching and mentoring as part of their CIPD studies. HEIW is a relatively new organisation and does not yet have a formal coaching and mentoring programme in place. However, this area is moving at pace, particularly as a training needs analysis identified coaching and mentoring as a gap in the organisation's L&D offering.

There are appropriately trained coaches and mentors in the organisation who are available to support staff in both the organisation and across NHS Wales as well as mentors who support staff, particularly those who are new to more senior roles. This has proved particularly successful as learning and development is encouraged within the organisation and so this approach is used to help individuals focus on their future aspirations and career development and gain the skills and knowledge required to enable them to progress in their career. One on one mentoring is encouraged in the organisation and has been used at executive level with a focus on individual skills and relationship building. Development and career mentoring is used to support employees to achieve their career goals, empowering them to make decisions on their development needs.

HEIW also has free access to Academi Wales, the Centre for Excellence in Leadership and Management for public services in Wales. They provide services to both those looking for a coach and those who wish to register as a coach. This is of particular benefit to the organisation as HEIW is made up of three legacy organisations and is still developing its culture. There remain pockets of distrust in the organisation as identified in the most recent NHS Wales Staff Survey and internal pulse surveys. Therefore, there are staff who would prefer to access external coaches and mentors at the current time.

A significant amount of work is being done to build on HEIW's culture, with the results of the most recent NHS Wales survey, Our Reflections, Our Decisions, Our Future (HEIW, 2020), being used as a conversation starter within individual teams. The approach is different to previous surveys in that the responses are fed back to individual teams within organisations for them to take responsibility for making positive change rather than the executive and senior managers making the decisions. The approach encourages teams and individuals to participate in discussions, feedback and discuss their reflections with colleagues and then make localised decisions. This is one of the steps NHS Wales is taking to change to a coaching culture, by encouraging teams to take responsibility for making positive change in a way that is appropriate for their individual circumstances.

The need for an individual to undergo coaching or mentoring is identified during performance reviews and appraisals. This process empowers employees to think for themselves and what career aspirations they what their development needs are and how they can be achieved. It then enables a

conversation with the line manager about how these needs can be met. Once these are identified, SMART objectives are set, ensuring that they are fit for purpose, achievable and relevant to both the employee and the organisation. Finally, the document is signed by both the line manager and the employee and forms a contract that the employee will work towards their objectives and the line manager will support them to do so. This ensures both parties remain accountable.

The process is based on coaching techniques to facilitate discussions between line managers and employees. The personal development action plan is agreed using coaching questions posed by the manager to the employee. To support managers to have these conversations, a bank of 101 different coaching questions is available to help facilitate the appraisal discussion. These focus on questions that can gauge job satisfaction, identify how individuals feel about their role, their team and the organisation, identify their biggest challenges and career development opportunities. There is also a values based Performance Appraisal and Development Review (PADR) document that is shared with appraisees in advance of their appraisal, which encourages them to reflect on their previous objectives and what worked well and not so well as well as think about their future career aspirations and development needs.

This process also identifies those who wish to develop and become coaches or mentors themselves. HEIW is currently supporting three cohorts of staff on the ILM level 3, 5 and 7 Coaching and Mentoring courses. This course requires students to undergo 20 – 40 hours of recorded coaching and mentoring, which is assessed as part of the qualification. Those undertaking this qualification do so with the expectation that they will support staff within the organisation and across NHS Wales for a minimum amount of time per year once qualified.

Whether individuals are coached internally or by an external provider, an initial no obligation meeting is held between both parties. This confirms that the coachee is self-aware and invested in overcoming the barriers identified. Once agreement to pursue the relationship is agreed, a formal contract is signed. This includes the timetable for coaching sessions and how long the relationship will last. The contract also documents that the coachee is committed to improving in the area of concern and is accountable for progressing their agreed actions.

Whilst HEIW does not have a coaching and mentoring policy in place, the organisation is currently working on the development of a People and OD strategy. This will consist of a suite of development opportunities for individuals at all levels of their career, including individual, managerial/aspiring manager and organisation/system level. All levels will include elements of coaching including gaining coaching skills for use in the workplace, making use of coaching triads and understanding what it is to be a manager as a coach. Senior Managers will have access to gain skills in mentoring. The purpose of this will be to enhance the organisation's drive to achieving a compassionate leadership culture, where we listen with fascination, have a shared understanding of the problems faced, empathy and provide action to support (HEIW and West, 2020).

Currently, the benefits of coaching and mentoring and the opportunities available are not widely promoted in the organisation and are only identified through the PADR process. Therefore, not all staff are aware of the opportunities available to them as both a coach/coachee and mentor/mentee.

Evidence 2



Values Based Performance Appraisal & Development Review

For use by all staff (except casual workers) DRAFT

Name:	Click or tap here to enter text.	Job Title:	Click or tap here to enter text.
Name of Manager:	Click or tap here to enter text.	Date of Meeting:	Click or tap here to enter text.

1. Self-Assessment

1.1 End of Year review of the previous six months / year for completion in April

Please refer back to the previous / most recent appraisal documentation to support your review.

Individual SMART objectives – Specific, Measurable, Achievable, Relevant and Time-bound			
	What was expected of you?	Was this objective met? If so, what impact did this have? If not, please consider the support that may be required to help deliver the objective.	What worked well, what did not work so well. What would you do differently?
1			
2			
3			
4			
5			

Manager comments
Click or tap here to enter text.

1.2 Have you demonstrated our values in your behaviour?

For discussion: Please refer to the findings of the '360 degree feedback', together with our 'Values and Competencies' framework. Which of the values were evident when you were working to complete the

objectives above? Were there any values that were not used? Why? Could any of them be used differently next time to help obtain a different result or outcome?

Employee comments
Click or tap here to enter text.

Manager comments
Click or tap here to enter text.

1.3 Talent and career planning For completion in April

The focus of this section should be on your potential and aspirations for future career development, along with your professional registration requirements.

Employee to complete: Thinking about your current role, your life and your career are you.

☐ Unsure of this role? You're new to the role or this may not be the right role for you	☐ Content with this role? You just want to do this role well	☐ Content with this role? You want to develop further within this role	☐ Ready for more? You want to be challenged further or take the next step in your career	☒ Ready for more? But feel that you cannot due to a restriction / constraint or a challenge
--	---	---	---	---

Why have you chosen the option you have?	Click or tap here to enter text.
What do you like about the current job you do? What don't you like and why?	Click or tap here to enter text.
What support do you need from your manager, the team or the organisation to fulfil your potential?	Click or tap here to enter text.

What Learning and Development have you undertaken this year:	Click or tap here to enter text.		
Following discussion, what was agreed regarding your readiness to progress?	☐ Now	☐ 1 Year	☐ 2 to 3 years

1.4 **Personal development planning (PDP)** **For completion in April**

The Personal development plan underpins and supports the delivery of objectives, career aspirations and values and behaviours. How will this be achieved? Managers are asked to consider blended learning opportunities (*i.e. coaching, mentoring, job shadowing, e-learning, as well as formal classroom training*). Interventions that incur a cost are subject to a learning and development bid being submitted to Executive in June. Academic qualifications are subject to a formal business plan being considered and approved in accordance with the 'Access to Learning and Development' policy.

Personal Development Plan: Please refer to information about the training and support available from HEIW Please also consider shadowing, projects, research, coaching/mentoring, 360 Feedback, as well as formal training opportunities.
Click or tap here to enter text.

1.5 **Professional requirements and continuing professional development** **For completion in April**

The focus of this section should be on your potential and aspirations for future career development, along with your professional registration requirements.

Name of professional and or clinical body. (i.e. GMC, NMC, HCPC, and any other Continuing Professional Development Requirements)	
Clinical and professional requirements needed for your role (if applicable)	<i>(i.e. proof of up to date PIN, registration with GMC, NMC or HCPC as appropriate and CPD)</i> Confirmation that you are pro: Click or tap here to enter text.

Annual Nursing and Midwifery Council (NMC) Revalidation Review

Ensure NMC Code of Conduct is available at meeting Manager to check that employee is working towards NMC Revalidation. Use Objectives/PDP section to ensure appropriate preparation for revalidation. Ensure professional portfolio is up to date	Date of Revalidation	Click or tap here to enter text.	
	Criteria	Yes/No	Comments/Actions
	Progressing to meet NMC Revalidation requirements. 450 Practice Hours CPD – 35 hrs (20 participatory) Practice Related Feedback x5 Reflections x5 (Min. over 3 year period)	☐	Click or tap here to enter text.
	Continues to remain competent for practice by meeting the requirements of the NMC Code	☐	Click or tap here to enter text.
At year 3 please complete the Confirmation of NMC Revalidation form, (this may be completed up to 1 year prior to revalidation date)			

2.1 **Objectives for the year ahead** **For completion in April**

Line managers should consider how the employee being appraised can support HEIW's Corporate and Team objectives when setting individual objectives.

Team Objectives What are the team / departments primary objectives this year to support the organisational strategy / objectives?
--

Please agree SMART objectives (*i.e. Specific, Measurable, Achievable, Relevant, and Time-bound*).

	Individual SMART objectives – Specific, Measurable, Achievable, Relevant and Time-bound		
	What is expected of you? Specific, Achievable, Relevant	Measure of success Measurable	When is this to be achieved by? Time Bound
1			
2			
3			

4			
5			

Employee comments
Click or tap here to enter text.

Manager comments
Click or tap here to enter text.

3.1	Review of the previous six months	For completion in September
In looking back at all of the one to one meetings over the last six months, please outline the main successes, achievements and challenges over the previous 6 month that has been discussed. Please refer to manager/employee guidance for information.		

Employee comments
Click or tap here to enter text.

Manager comments
Click or tap here to enter text.

3.2	Do you demonstrate our values in our behaviour?
Here you need to consider what was done well and what could be done better, providing evidence and examples for discussion.	
Employee comments	
Click or tap here to enter text.	

Manager comments
Click or tap here to enter text.

--

From the review, is there anything that you would like to share across HEIW as a potential case study for consideration in the next HEIW Employees Awards event?

Click or tap here to enter text.

Employee Signature:		Date:	Click or tap to enter a date.
Manager Signature:		Date:	Click or tap to enter a date.

Manager Checklist

☒	Record on ESR ‘
☐	Set the dates for one to one meetings and the next Performance Appraisal

A bank of 101 different questions to ask during one to one discussions

To start the meeting: Many line managers like to use the same, unassuming opener at each one to one. It may seem boring, but doing so encourages direct reports to drive the conversation by starting with a topic they want to talk about (remember, it's their meeting). The answer will also help you gauge how they're feeling that week.

1. How's it going?
2. So, what's on your mind?
3. What would you like to start with?

To gauge job satisfaction: Proactive questions about job satisfaction can help you unearth issues before they become full-blown problems — and lead to unwanted turnover. Some direct reports are more forthcoming than others, so even if the answers to these questions sound positive, listen for clues to deeper issues, and ask plenty of follow-up questions.

4. How are you feeling about your role?
5. Are you happy here? What makes you say that?
6. Do you feel like you're growing in your role? What makes you say that?
7. What interests you about your work, and why?
8. What is your favourite/least favourite thing about your work right now?
9. How do you think that least favourite thing affects your overall performance?
10. What's working well for you in your current position?
11. What would you like to see change?
12. In what ways does your current position allow you to use your skills and talents?
13. Which areas make you feel like your hands are tied or you are unable to reach your full potential?
14. What do you think you could be doing differently?
15. If you could work on anything for the next month, what would it be? What makes you say that?
16. What's one thing that could make your work more satisfying, and why?
17. Which areas would you would like more feedback on?

To address career development: Some direct reports may have a career path fully mapped out, down to desired promotion dates. Others may have no clue what they want to do next. No matter where your direct reports stand, it's worth bringing up career development in your one to one's to ensure you get the best out of your team and keep people happy in the long term.

18. What are you most proud of, and what do you think you might want to do next?
19. What are two to three new skills you'd like to learn on the job? What about those skills interests you?
20. What other roles here could you see yourself in down the line? Or what areas would you like to explore?
21. If you were to create your ideal position, how would it differ from what you are currently doing?
22. How is your current work helping or hurting your professional development?
23. Which career or development goals do you feel like you're not able to focus on right now?

24. What else can I be doing to help you grow/advance in your career?
25. Imagine it is two years from now, and things have gone well? What has been your role in that? What does your role look like now?
26. Have you given any more thought to your long-term goals since our last meeting? What are your latest thoughts?
27. Where do you see yourself in three years? Five years?
28. What professional goals would you like to accomplish in the next 6 to 12 months, and what makes you say that?
29. To help identify and clarify the goal: What do you want to achieve? What will you do to achieve it? When will you do it? Who do you need to involve? When should you see results?
30. What about this goal is important to you and what will be different when you achieve the goal?

To gauge how the person is feeling about the organisation: These types of questions may yield good ideas you want to pass upward, or at least give you an opportunity to explain why decisions have been made the way they have. They will also give you insight into another facet of the person's job satisfaction.

31. What's the biggest opportunity we're missing out on?
32. If we could improve in any way as an organisation, how would we do it?
33. What would you like to see change here? Why do you say that?
34. What's the No. 1 problem with our organisation, and what do you think's causing it?
35. What are we not doing that we should be doing? What makes you say that?
36. What are we doing that you think we should stop doing, and why?
37. How are you feeling about the organisation's overall? What makes you say that?

To gauge how the person is feeling about the team: You want to be sure your team is functioning at a high level, and here's a chance to uncover problems and opportunities that will benefit everyone.

38. How would you describe the personality of the team? What sort of person would be a good fit here? What sort of person would add something we're currently missing?
39. How would you say we're doing at working together as team? What makes you say that?
40. What are some ways we could improve at teamwork? What makes you say that?
41. Who would you like to work more/less often with? Why?
42. How would you describe the division of work among team members?
43. Do you feel adequately supported by other team members? What makes you say that?
44. Is there anything you'd like to see change about the team, and if so, why?

To check in on how the person's coping with a recent change at work: Change is inevitable. And no matter what type it is — change is more of a process than a single event. Make sure to check in with direct reports on how it's going when something has changed in their work life.

45. How are you feeling about the recent news? Why do you say that?
46. What concerns do you have about the change that haven't been addressed?

47. What's going well and not so well with the new situation/development? Why do you think this might be happening?

48. Do you have a clear understanding of the new goals and expectations? What makes you say that?

49. How is the new situation/development affecting your work? What could be getting in the way of your being effective?

To learn more about a project: These questions go beyond a status update; they help you to learn about what your direct report finds engaging, as well as challenges or roadblocks you may be able to help with.

50. How are you feeling about the project?

51. What aspect of this project has been particularly interesting for you?

52. What do you feel like you're learning from this project?

53. What frustrates you about the project?

54. Which areas would you like to spend more time on and why?

55. What do you think has gone well? What do you think you could have done better? What, if anything, would you like to do, but haven't been able to?

56. What can I do to make things more manageable?

57. How might I make this project more challenging or interesting for you?

58. What do you think I should know about the project, but might not?

To learn your direct report's biggest challenges: For some, discussing a challenge is like admitting a failure. Let your direct report know that you want to hear about his or her concerns because you care about making things better.

59. What is the biggest challenge you are currently facing? How can I help with that?

60. At what point in the past week were you most frustrated with or discouraged by your work? What can I do to help you manage that?

61. What are your biggest concerns about your current workload?

62. I've noticed X about the project/work... Can you help me understand that better? Talk me through your process.

63. Which parts of your role are unclear or confusing?

64. How is your workload right now?

65. How has your work/life balance been lately?

66. What sort of resources could you use right now to make things more manageable?

To draw out an issue: If your direct report seems to stop short or gives a curt response on a topic where you think there may be important issues lurking beneath the surface, use open-ended questions to encourage him or her to continue.

67. Could you tell me a little more about that?

68. Can you share some of the details around that particular issue? (Who was involved? Where? When? For how long?)

69. What was that experience like for you?

- 70. What did you like most/least about that?
- 71. How did that affect you?
- 72. How did that make you feel?
- 73. If you could change what happened, how would you alter it?
- 74. What do you think caused that to happen?

To coach a direct report on a particular issue or challenge: Coaching can be a powerful way to encourage, empower, and help direct reports to solve their own problems. Ask questions that help the person establish a goal outcome, explore the situation, generate a set of potential solutions, and finally plan the way forward. HEIW will establish Coaching Training for Line managers, *'Line Managers as Coaches'*, and will look to establish its own internal Coaching and Mentoring network. Please contact Organisational_Development_HEIW@wales.nhs.uk if you would like additional information.

- 75. What is your number one issue or challenge right now? How are you feeling about it?
- 76. What would be the most helpful thing for you to take away from this conversation in order to make progress on it?
- 77. What have you tried so far to make progress on it?
- 78. What ideas can you bring in from past successes?
- 79. What haven't you tried yet?
- 80. What are some possible ways to get the solution you need?
- 81. What additional resources from me would be helpful for you as you solve this problem?
- 82. What are your next steps to make progress on this problem?

To promote continuity between meetings: Your one to one's will be more effective in the long term if you follow up on the topics, goals, and actions discussed in previous meetings and set items for follow up next time.

- 83. What sort of progress have you made on the next steps we discussed last time?
- 84. In our last one to one you mentioned that you'd like to grow in X — how has that been going?
- 85. In our last one to one you mentioned you were frustrated by X and wanted to try Y as a solution. How has that been going?
- 86. What development areas do you want to work on in the coming weeks?
- 87. What actions will you take before our next 1-1 to make progress on X? (Also discuss and agree on actions you will take to help.)
- 88. During this meeting you've mentioned that you'd like to pursue X. What steps can you take toward that before our next one to one?
- 89. What additional resources can I provide for you between now and the next time we meet?

If you feel like your one to one's are stuck in a rut, or ineffective: You want a one to one to be a good use of your time, as well as your direct report's. Sometimes a simple change of scenery can help. Other times, direct and honest questions about the issue can really open things up — chances are if you feel the meetings aren't as effective as they should be, your direct report feels the same way, too.

- 90. Would you like to walk today, or go somewhere else outside the office?

91. I've noticed that our last several one to one's have lacked energy. What are your honest impressions of this meeting? What could we be doing differently or better?

92. What would you like to see change about these discussions? How could we make them more useful for you?

93. What would you be doing right now if we weren't having this meeting? How do you feel about being taken away from that task?

94. I'm trying to make my one to one's better and would appreciate your honest feedback on this one — what did you like about it, and what could be improved?

To address the direct report's personal life (In accordance with [the 'managing absence and attendance policy'](#), "knowing your employee"): Asking about your direct report's personal life can be a good way to show that you care about him or her as a person. Be sensitive and keep in mind that some people are more private than others. Depending on the employee, personal topics could be informal small talk about the person's family or interests, or more serious matters. It's often good to start with broad questions, like these, and be careful not to make assumptions.

95. How are things going for you outside of work?

96. How do you feel about your work/life balance?

97. What, if anything, did you used to do that you find you don't have time for right now?

98. I've noticed you're a little quieter than usual. Is there anything you'd like to talk about?

99. What could we change about work that would improve the rest of your life?

To ask for feedback on the one to one's and on your performance as a manager: Getting feedback from your direct reports can be just as important as giving it. Not only will it help you improve as a manager, it can also build trust and strengthen your relationship with your direct reports. However, only ask for feedback if you feel confident in your ability to take the feedback well and act on it; asking and then doing nothing could do more harm than good. Plus, given the power dynamic involved, how you ask is critical.

100. I'm interested in feedback on how I can improve as a manager. In preparing for our next one to one, would you be willing to think through what you like about how I do X (for example, run team meetings) and what I could do differently or better? (Ask prior to the one to one.)

101. I'd like to improve as a manager and I could really use your help. Next week, would you be willing to...

Please note that additional tools are available to line managers on giving real time feedback and creating a real time feedback culture. In addition, there are resources available via the e-Library for health, www.wales.nhs.uk/elibrary

People Team (JA)

5th March 2019

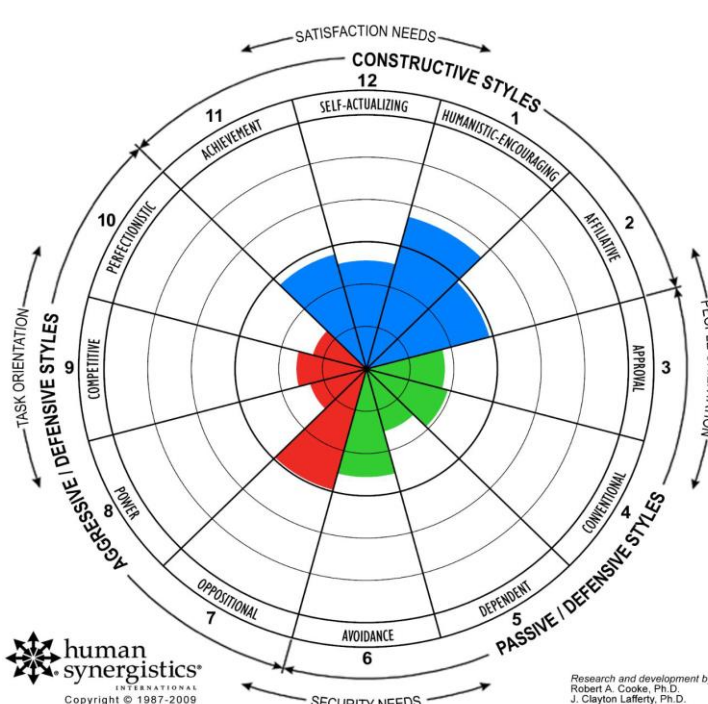
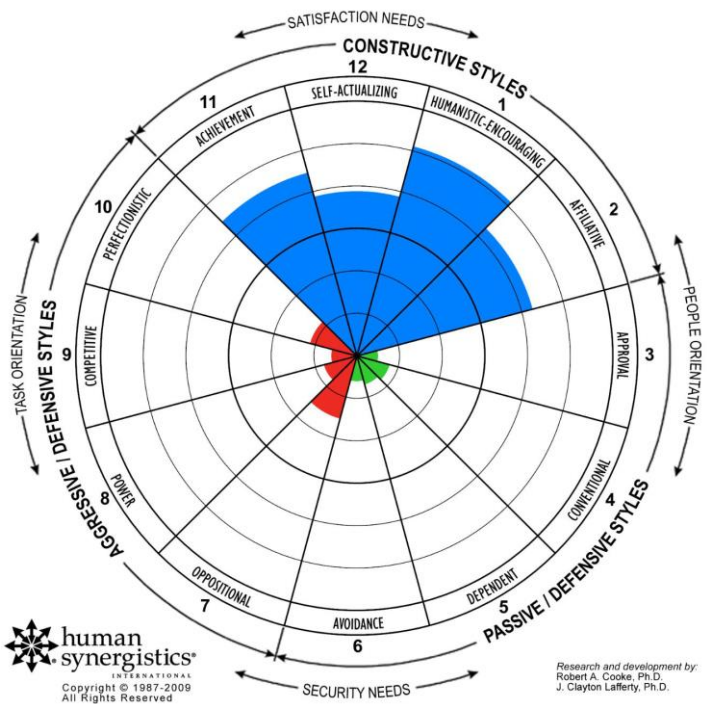
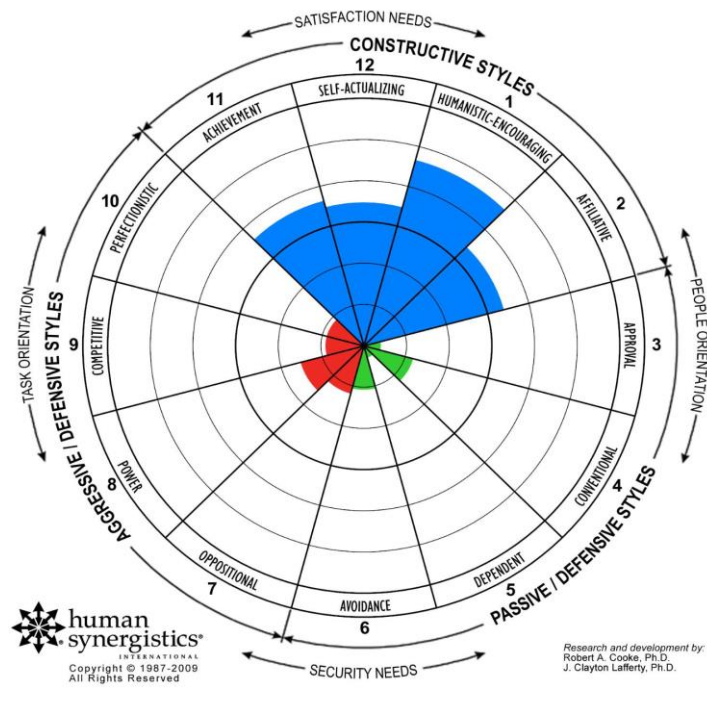
Organisation approach to coaching and mentoring

Strengths	Weaknesses
Underpinned by values and behaviours developed by staff for staff	Under promoted
Experienced coaches within organisation	Lack of understanding of what C&M is
Training opportunities available to become coach/mentor	Budget constraints due to welsh government funding
Access to coaching and mentoring (internal and external)	Lack of awareness of C&M principles
Appraisal process based on coaching questions	Associated with negative factors
Development opportunities for qualified coaches and mentors – mediators	Pockets of distrust
Managing attendance at work policy based around coaching questions	Differing T&Cs between Cardiff University TUPE'd staff and NHS Wales staff causing organisation cultural differences.
Clear link between individual, team and organisational objectives.	Small organisation
Part of NHS Wales coaching and mentoring network	No formal coaching and mentoring programme available.
Coaches and mentors available across Wales	No HEIW bespoke contract in place
Use of formal contracts	Disciplinary and grievance policy
No cost involved	Outcomes are not measured
	Only 67.5% of the organisation take time out to reflect and learn.
Opportunities	Threats
Develop coaching culture via Building Healthy Relationships framework (Conflict and resolution rather than grievance and disciplinary)	Organisation is not open to developing a coaching culture
Promote that organisation is already using C&M techniques – PADR and MAAW.	Impact of COVID-19
Apply C&M techniques to support employee wellbeing.	• Manager capacity • Virtual working • H&WB - C&M vs counselling – need to be right approach
Further embed compassionate leadership principles	Lack of manager confidence to have difficult conversations
Re-evaluate organisation culture	Perception of favouritism
Use experts to promote benefits and principles	Understanding boundaries and inability to recognise most appropriate method of support.
Once coaches/mentors are trained, they are utilised across NHS Wales.	
Development of statement of intent	
Use in succession planning to keep knowledge within the organisation	
Use results of staff survey as a conversation starter using C&M techniques and then build to reflections on pulse surveys, HNA etc.	
Greater use of qualitative data	

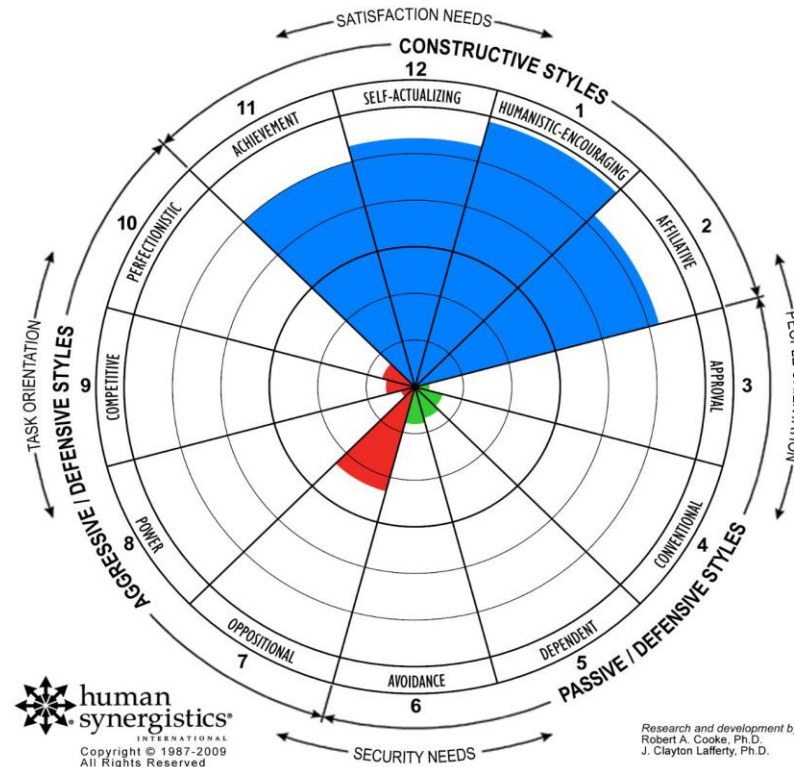
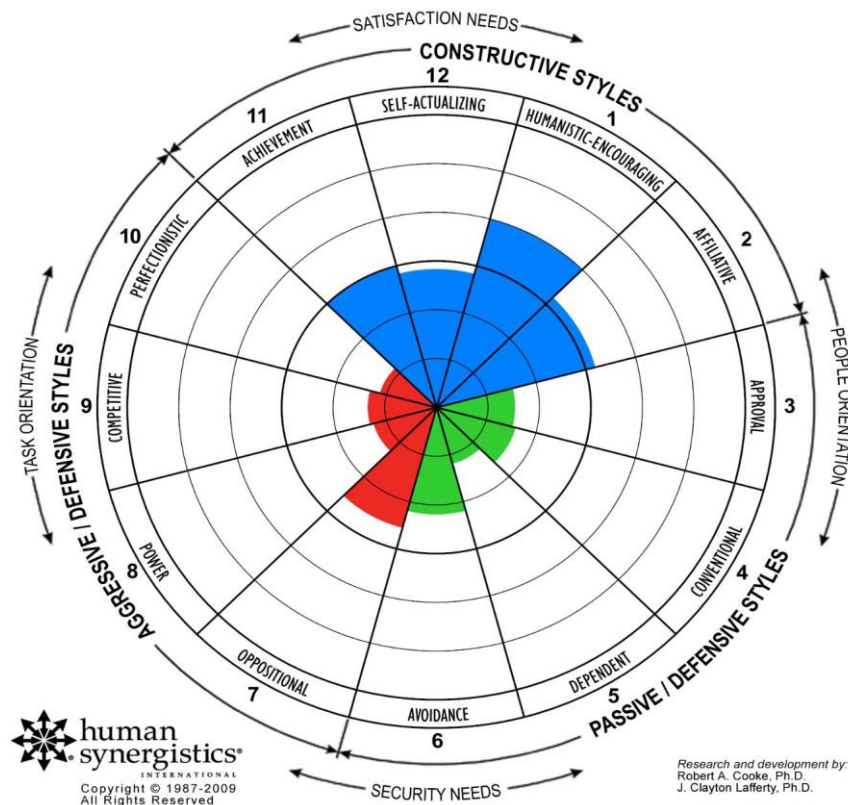
WEDS n = 17

WCPPE n= 27

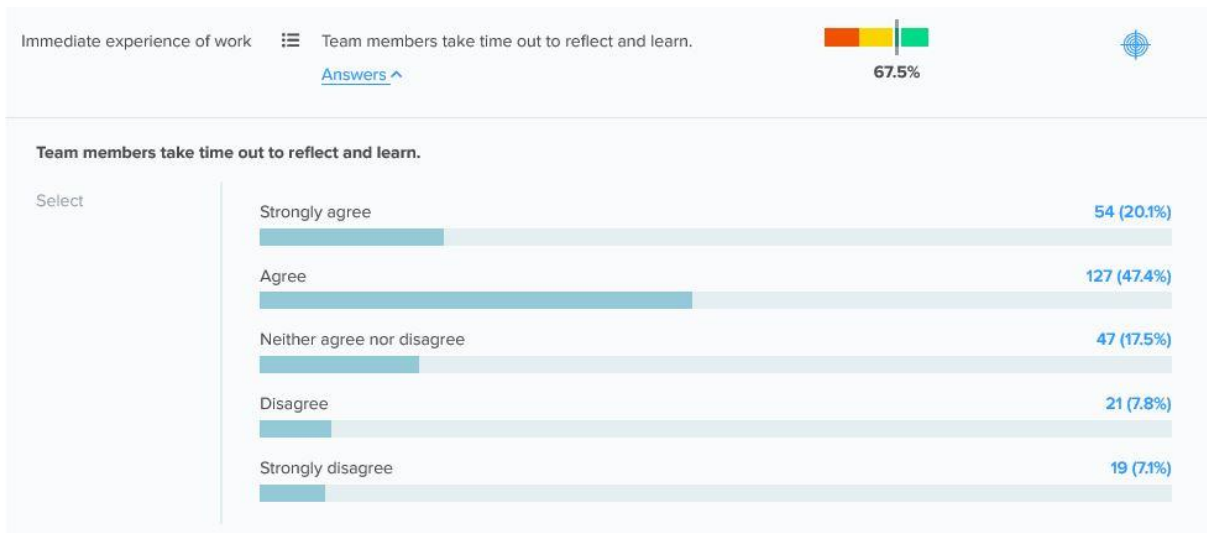
The Deanery n=126



HEIW Gap between Current (2018) and Ideal



Evidence 6





**Notes from meeting with Jeremy Ashdown, Learning and OD Practitioner, HEIW
Contributing to Coaching and Mentoring in the Organisation**

Wednesday 3rd March 2021

Present:

Jeremy Ashdown, Learning and OD Practitioner (JA)
Emma Carrington, Health and Wellbeing support officer (EC)
Ruth Taylor, Careers and Widening Access Advisor (RT)

RT and EC asked to meet with JA to identify ways in which we could meet the learning outcomes of our CIPD Contributing to Coaching and Mentoring in the Workplace portfolio as well as benefit the organisation.

There is very little resource available within the organisation on coaching and mentoring. We therefore discussed the development of a presentation that can be shared with staff that gives an overview of coaching and mentoring, the benefits associated with, the required behaviours and skills and the opportunities available. We also discussed the work that needs to be done following the recent NHS Wales staff survey and how responsibility for change sits with individual teams. We thought this resource could incorporate some guidance on approaching those conversations to support line managers. The finalised resource could then be used in its entirety or broken down into sections to support the target audience.

We discussed how we could contribute to coaching and mentoring processes. JR explained that as coaching and mentoring programmes are new and HEIW staff are still undertaking the training, no formal coach/coachee or mentor/mentee contract has been developed. He therefore suggested that it would be very helpful for us to use our learning to produce a draft version of a contract that could be used by staff once they have completed their qualification. JA suggested that we looked at other NHS contracts available and other best practice examples available and develop a bespoke contract for our use.

We discussed how we could evaluate the current coaching and mentoring programmes and look to improve them. Whilst it is difficult to evaluate at the current time with individuals still undergoing their training, we agreed that there would be value in measuring the impact the training has had by surveying the students at the end of their qualification. We therefore agreed to develop a questionnaire that could be used in the future to begin collecting data on the effectiveness of the coaching and mentoring training provision and the impact it has had on the individuals and their way of working and managing staff. In future we would look more closely at KPIs including the number of situations eg. disciplinaries and grievances, sickness levels etc, requiring HR input to see whether this number reduces as the organisation's coaching culture develops.

We also discussed how the organisation is looking to develop an internal mentoring scheme, whereby staff with advanced workplace skills knowledge could share their expertise with other staff. To enable the organisation to implement this, it was agreed that we would develop a skill gap analysis questionnaire, which would be shared with all staff in the organisation. This would help identify the skill gaps in the organisation and also identify those with advanced skills who would like to share their knowledge with the wider workforce. Staff wishing to do this would be supported to complete a

formal mentoring qualification, enabling them to effectively mentor staff in their area of expertise. This would support the organisation's values, together as a team and ideas that improve and be of mutual benefit to those requiring upskilling and those with advanced skills being offered the opportunity to develop their mentoring skills. Providing this service internally will not only be of very little cost, but will allow all staff to contribute more effectively to the organisation and its overall objectives, supporting its strategy of developing the future workforce of the NHS in Wales.



GIG
CYMRU
NHS
WALES

Addysg a Gwellu Iechyd
Cymru (AaGIC)
Health Education and
Improvement Wales (HEIW)

Coaching and Mentoring within HEIW

Emma Carrington & Ruth Taylor
February 2021

What **is** coaching and mentoring? What is it **not**?

Coaching

Coaching is about unlocking a person's potential to maximize their own performance, whilst helping them to learn rather than teaching them (Gallway, 1975)

Mentoring

A relationship between two individuals, whereby the more experienced shares their greater knowledge with the less experienced individual (Blakemore, 2014)

Counselling

Coaching and mentoring is used to support general life scenarios, with the aim of making improvements and achieving better results, whereby counselling tends to be more specific, dealing with issues related to trauma and mental illness (Starr, 2011).

One to one training

Where a knowledgeable individual facilitates the learning of another in a specific task and then measures progress (Agarwal, 2021).



GIG
CYMRU
NHS
WALES

Addysg a Gwellu Iechyd
Cymru (AaGIC)
Health Education and
Improvement Wales (HEIW)

Trawsnewid y gweithlu ar gyfer Cymru iachach
Transforming the workplace for a healthier Wales



Blakemore, R (2014) *Coaching vs mentoring - why the difference matters*. Available at: <https://www.apm.org.uk/blog/coaching-vs-mentoring-why-the-difference-matters/>

Gallwey, T. W. (1975). *The Inner Game of Tennis*, New York: Random House

Starr, J. (2011) *The Coaching Manual: The Definitive Guide to the Process, Principles and Skills of Personal Coaching* 3rd ed. Great Britain: Pearson

Agarwal, S (2021) *What is the Difference Between Coaching, Mentoring, and Training?* Available at: <https://businesscoaching.actioncoach.co.uk/what-is-the-difference-between-coaching-mentoring-and-training/> (Accessed: 27 January 2021)

Coaching and Mentoring Myth busting

- It is only for **“fixing problem people”**
- It takes a **long time**
- If I’m asking questions, I’m coaching
- It’s just for **people who have problems**, not for successful people?
- Coaching is the **same** as mentoring, 1:1s, training and counselling
- They get **few real results**
- They’re a 21st century **fad**
- They **can’t** be used on poor performance.
- Coaches **don’t need** coaches
- They need to be done **face to face**.
- They are **not quantifiable**



GIG
CYMRU
NHS
WALES

Addysg a Gwellu Iechyd
Cymru (AaGIC)
Health Education and
Improvement Wales (HEIW)

Trawsnewid y gweithlu ar gyfer Cymru iachach
Transforming the workplace for a healthier Wales



[11 Myths of Coaching \(janbrause.co.uk\)](http://janbrause.co.uk)

Hill, M (2017) *Coaching and Mentoring Confidentiality*. British School of Coaching.
Available at: <https://www.britishschoolofcoaching.com/coaching-mentoring-confidentiality/>

<https://www.forbes.com/sites/johnhall/2017/11/14/7-coaching-myths-that-are-keeping-you-from-being-a-better-leader/>

<https://proteusleadership.com/7-myths-of-coaching/>

Benefits – for you, your team and the organisation

Together as a team	Ideas that improve	Respect for All
• Improved team work • Can facilitate matrix and intergenerational working • Improves communication • Improved relationships • Integral to productivity and performance	• Encourage innovation • Useful for adopting new technology and ways of working • Manage risk more effectively • Help you work at your best • Plan more strategically • Help you work at your best	• Development of interpersonal skills • Aid in the development of a culture of trust and personal responsibility • Reduction in conflict



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<https://www.coachmentoring.co.uk/blog/2018/10/benefits-of-coaching-research-reality/>

These benefits correlate with the organisation's values and will support the organisation to achieve their aims, objectives and overall strategy.

Coach/Mentor	Coachee/Mentee	Organisation
• More self reliant and able to take responsibility for own actions and commitments • Great job and personal satisfaction • Work more productively with others • Communicate more effectively • Improved career prospects • Encourage more strategic thinking • Development leadership skills • Improved interpersonal skills • Learn new perspectives	• Improved career prospects • Opportunity to learn new skills • Help unlock potential • Become more self aware • Improved productivity • Assist with achievement of objectives • Improved relationships with colleagues • Improved job satisfaction • Challenge self defeating beliefs • Learn new perspectives • Build your network	• Empower individuals to take responsibility • Improved employee engagement • Improved individual performance • Identify organisation strengths and development opportunities • Motivates employees to be their best • Demonstrates commitment to People & OD development • Aid retention and loyalty of staff • Can support organisational change • Reduction in conflict • Improved health & wellbeing of staff



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Benefits continued – to coaches/mentors, coachees/mentees and the organisation

<https://instituteofcoaching.org/coaching-overview/coaching-benefits>

<https://www.brighthr.com/articles/training/coaching-mentoring/benefits-of-coaching-and-mentoring-in-the-workplace/>

<https://www.coachmentoring.co.uk/blog/2018/10/benefits-of-coaching-research-reality/>

https://www.mindtools.com/pages/article/newCDV_72.htm

Comments

"Coaching is fundamental to being a compassionate leader, and provides a practical toolkit for application"

I continue to benefit from coaching as this provides me with one of the 5 ways to wellbeing and the practice helps retain and improve my skills. Outside of the coaching relationship I also used a coaching style to my line management and project management role

Coaching and mentoring has given me focus and drive to work towards my career ambitions



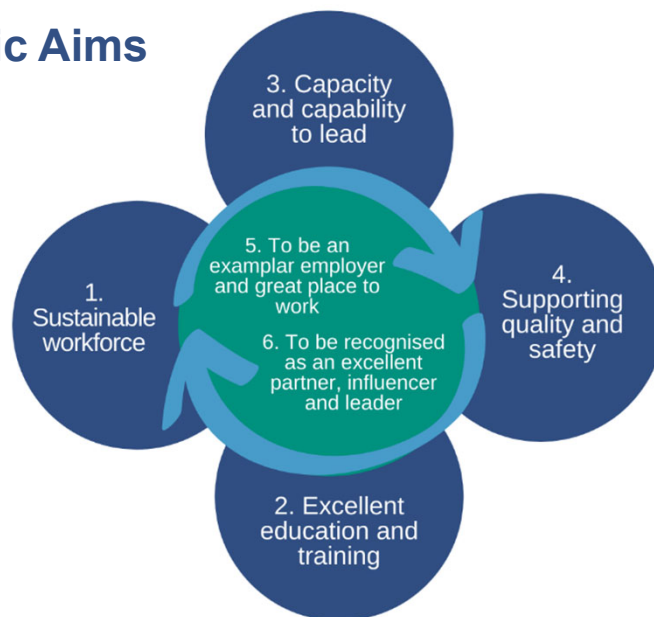
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We asked some HEIW line managers to comment how the ILM coaching and mentoring qualifications has benefited them and/or their team to date.

HEIW Strategic Aims



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Using coaching and mentoring techniques and embedding programmes into the organisation will support the achievement of our strategic aims.

We are already doing it!



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Values Based Performance Appraisal & Development
For use by all staff (except casual workers) **DRAFT**

Name:
Click or tap here to enter text.

Job Title:
Click or tap here to enter text.

Name of Manager:
Click or tap here to enter text.

Date of Meeting:
Click or tap here to enter text.

1. Self Assessment
1.1 End of Year review of the previous six months / year for completion in April

Please refer back to the previous / most recent appraisal documentation to support your review.

Individual SMART objectives – Specific, Measurable, Achievable, Relevant and Time-bound			
	What was expected of you?	Was this objective met? If so, what impact did this have? If not, please consider the support that may be required to help deliver the objective.	What worked well, what did not work so well. What would you do differently?
1			
2			
3			
4			
5			

Manager comments
Click or tap here to enter text.

PADR

Coaching and mentoring techniques are applied in PADRs. Employees are encouraged to reflect on their previous objectives and think about what went well, not so well and what could have been done differently. This is used to facilitate a discussion with the line manager, where open dialogue about future aspirations is held, discussing any potential barriers and how they could be overcome.

HEIW Values Based Performance Appraisal



Plan ahead & Embrace Change

Educate & train staff

Offer opportunities

Partnership working

Lead the way

Exciting, enthused, engaged, enabling, empowering individuals



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HEIW's performance appraisal process is a cross organisation approach whereby organisational objectives are linked through to teams and individual objectives to ensure all staff understand what part they play in achieving the organisations objectives and ultimately contribute to business success. It is also an opportunity to recognise L&D opportunities that will not only help the individual to be the best they can be in their role, but also allow them to pursue their aspirations and progress in or outside the organisation.

The process is made up of both formal and informal stages between the employee and their line manager:

Formal

- Objective setting – agree objectives for following year which are set against the organisations objectives
- Talent conversations – allow individuals to discuss their future aspirations and potential opportunities for development. Opportunity to identify successors to critical posts
- Mid year review – assess progress against set objectives
- Annual review - review outcome of objectives and assess against values and behaviours and set next years objectives.
- Process ensures individuals are developed to enhance and ensure job satisfaction and

also support organisational outcomes.

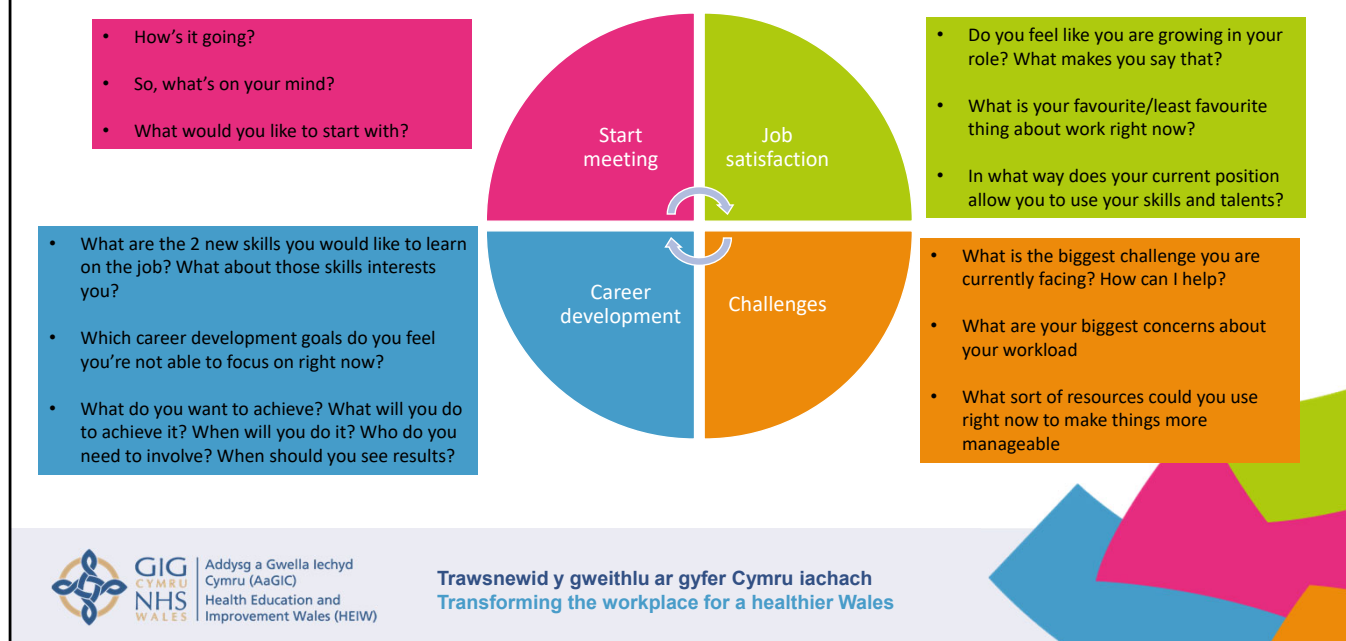
Informal

1:1 discussions –at least monthly to informally monitor progress and discuss challenges and opportunities.

Day to day communication - Taylor (2016) describes this as continually seeking to engage and motivate staff on a day to day basis.

The process incorporates the PEOPLE principles

Examples of coaching questions



To start the meeting: Many line managers like to use the same, unassuming opener at each one to one. It may seem boring, but doing so encourages direct reports to drive the conversation by starting with a topic they want to talk about (remember, it's their meeting). The answer will also help you gauge how they're feeling that week.

To gauge job satisfaction: Proactive questions about job satisfaction can help you unearth issues before they become full-blown problems — and lead to unwanted turnover. Some direct reports are more forthcoming than others, so even if the answers to these questions sound positive, listen for clues to deeper issues, and ask plenty of follow-up questions.

To address career development: Some direct reports may have a career path fully mapped out, down to desired promotion dates. Others may have no clue what they want to do next. No matter where your direct reports stand, it's worth bringing up career development in your one to one's to ensure you get the best out of your team and keep people happy in the long term.

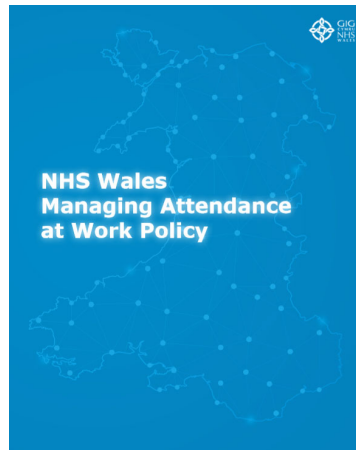
To gauge how the person is feeling about the organisation: These types of questions may yield good ideas you want to pass upward, or at least give you an opportunity to explain why decisions have been made the way they have. They will also give you insight into another facet of the person's job satisfaction.

To gauge how the person is feeling about the team: You want to be sure your team is functioning at a high level, and here's a chance to uncover problems and opportunities that will benefit everyone.

To learn your direct report's biggest challenges: For some, discussing a challenge is like admitting a failure. Let your direct report know that you want to hear about his or her concerns because you care about making things better.

To coach a direct report on a particular issue or challenge: Coaching can be a powerful way to encourage, empower, and help direct reports to solve their own problems. Ask questions that help the person establish a goal outcome, explore the situation, generate a set of potential solutions, and finally plan the way forward.

Managing Attendance at Work Policy



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MAAW

The People Team can:

- support managers to foster good working relationships and high levels of interpersonal trust, through coaching and development activities.

Managers can:

- Maximise the impact on NHS services by supporting employees in doing the jobs they have agreed to do and through the Managing Attendance at Work Policy, using a proactive and preventative approach.
- Develop a positive working environment and foster a culture of support for staff.
- Actively encourage the employee to participate in intervention in a timely manner, e.g. attendance at occupational health appointments, and engaging with services available and self-help action.
- Create an environment, which is conducive to health and wellbeing, and in which a low sickness absence record and regular attendance at work is expected.

Employees:

- Be responsible for their own health and wellbeing
- Must consider whether there are any reasonable / tailored adjustments that may help them to remain in work or return to work at the earliest opportunity.

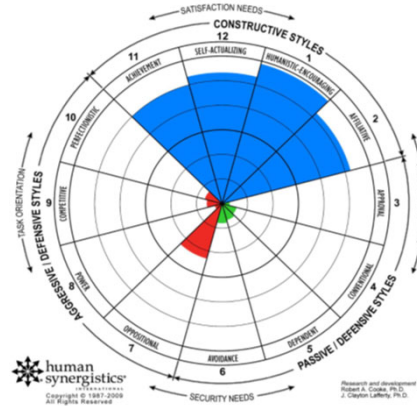
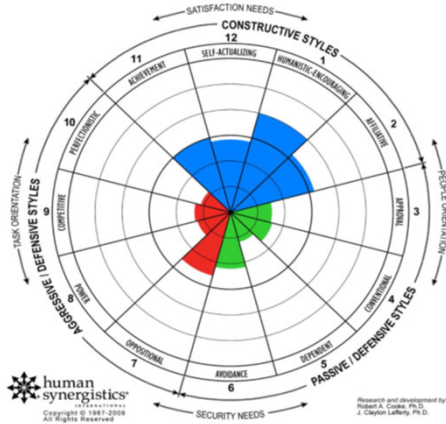
[illegible]

Passive Defensive cultures are about survival/security/keeping your head down
Aggressive Defensive is about survival by competing, controlling, arguing etc

All organisations when describing their ideal are predominantly constructive

Less than 50% then it is there but less stringly)or in pockets/not frequent or not consistent

HEIW Gap between Current (2018) and Ideal



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The wheel on the left shows HEIW's culture prior to establishment in October 2018. This demonstrates some negative culture elements that go against a culturing culture, including task orientation behaviours, which are aggressive/defensive in style as well as some security needs, demonstrating passive/defensive behaviour. These culture behaviours can be a barrier and there needs to be a strong shift towards more constructive culture styles.

Prior to October 2018, staff in legacy organisations were asked what culture they would like to see (right hand side wheel). They said they wanted to have a culture that used more constructive styles encouraging supportive, constructive styles when dealing with others as well as being open. As HEIW builds on the development of a coaching culture, this shift should naturally happen.

The culture assessment is due to be repeated shortly and it will be interesting to see what impact the initiatives carried out over the preceding two years has had on the organisation culture and whether the organisation has moved towards a more coaching culture, using more supportive and constructive styles.

HEIW offering



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Internal

ILM Certificate in Effective Coaching and
Mentoring (Lv 3, 5 & 7)



External

Access to external coaches and mentors
– free of charge!



Informal

Team meetings
1:1s
Peer Support Groups
New Starters Network



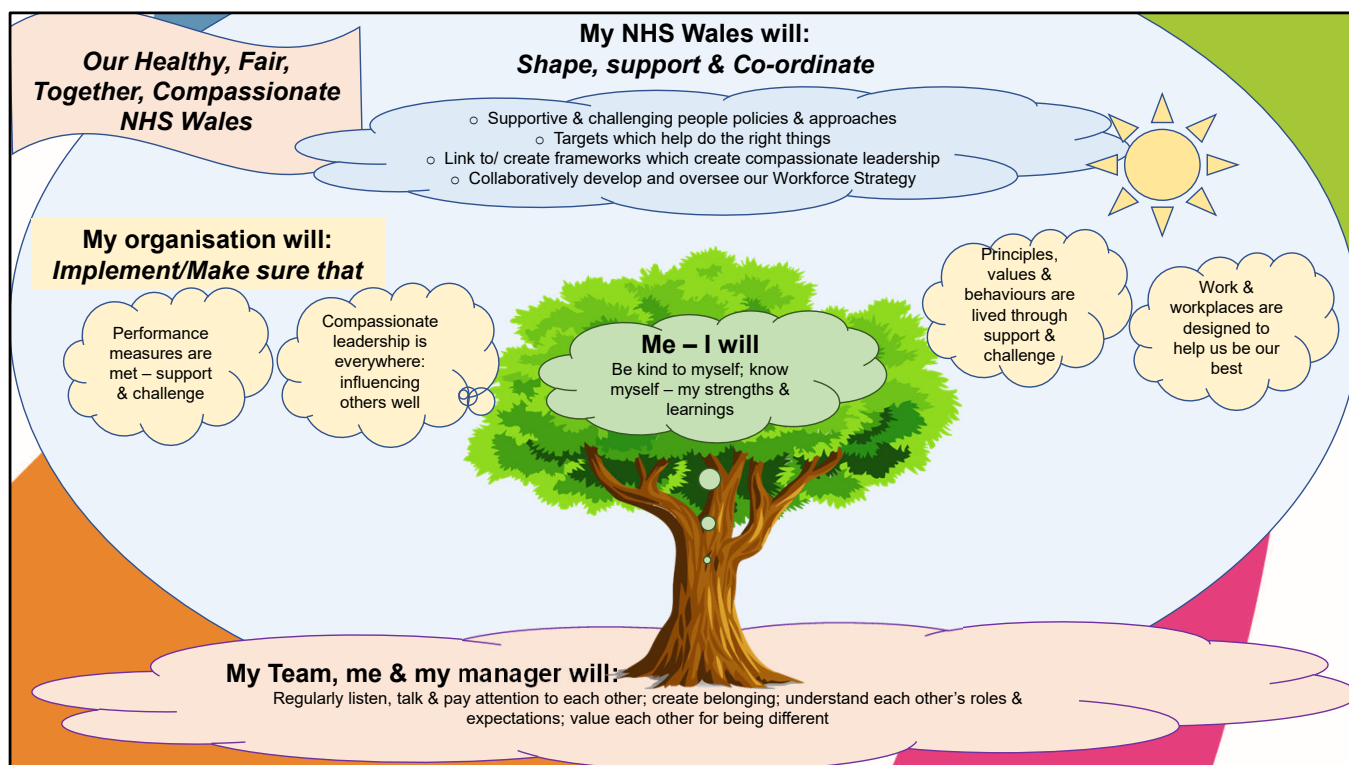
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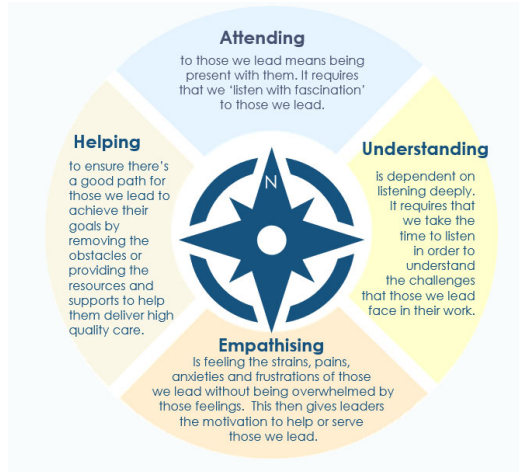
Speak with your line manager or the People Team to discuss these opportunities and how you can access services and opportunities.

Programme Outline Example (Lv5)

- 5 days of experiential learning.
- 5 x co-supervised coaching sessions.
- Detailed training manual.
- Lifetime access to your course on Udemy.com (a complete coaching and mentoring training programme in video eLearning format)
- On-line assessment, support and feedback.
- Provision of group, tutor and peer supervision.



Compassionate Behaviours Compass



How do we demonstrate compassionate leadership? By:

- Creating cultures where teams feel safe to be open about challenges, share their ideas and share a vision.
- Providing regular time for team reflection to enable sharing of learning and experiences.
- Connecting fully with colleagues and users of our services with the intent to help and support.
- Taking the time to listen in order to understand the challenges that colleagues and those we lead face in their work



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HEIW is leading the way on Compassionate Leadership. The promoted principles associated with this approach prepare the organisation for moving towards a coaching culture and are behaviours that are required of all effective coaches and mentors.

HEIW behaviours

Actively Listen – make time to listen, to hear and to respond to everyone's views	Seek to understand alternative view points	Challenge constructively and objectively , dealing with disagreement quickly & respectfully
Respect other people's expertise and trust others to do their job	Treat people fairly and equitably	Value all differences
Seek out, recognise and value knowledge and experience from others	Openly receive contributions from colleagues & partners	Work hard for each other , contribute our best, whether supporting or leading
Work collaboratively	Be open and transparent and work towards shared objectives	Be creative, curious, future thinking
Drive informed innovation & improvement for patients, staff and learners	Have fun!	Challenge the status quo, suggesting constructive solutions
Empower staff, teams and partners to improve	Seek out and respond to feedback	Celebrate success
Embrace and learn from mistakes	Focus on "whys" – the purpose and the outcome	Create and protect time



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Our values and behaviours have been developed by us, the 400 plus people who have come together as a team to form HEIW. They reflect our thoughts, feeling and beliefs in how we will, and, wont behave and trust others. They reflect how we will carry out our work and support the delivery of health and social care to the people of Wales.

Whilst displaying all the behaviours is essential for all employees, the behaviours highlighted in green are particularly important for being a effective coach/mentor, linking back to best practice.

Actively listen

Collaborative working – working towards shared aims & objectives

Focus on the "whys" and empower coachees/mentees to come up with their own solutions

Be fair and equitable

Challenge constructively and objectively to help the coachee/mentee to learn

Commit to the relationship

Celebrate when things go well

Time should be protected with no interruptions. Give your whole self to the individual.

Develop shared behaviours



Reinforce



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Developing a workplace where we all have time to pause and breathe, listen to each other and ask questions, offering considered, helpful suggestions will encourage a coaching approach to our work and relationships. These are reinforced by policy, the compassionate leadership principles and demonstrated by our success in achieving awards and national recognition.

From



Tasks, action and doing
Instruct, comply hierarchy
Consistency – treat everyone
the same
Passive



To



Coach & facilitate
Relationships and
conversation
Individuals and local teams
make decisions
Everyone is different,
individual and diverse



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Skills for effective coaching - activity

1. Building rapport
2. Paraphrasing
3. Not operating from our own autobiography
4. Questioning
5. Take a positive approach to challenges and problems
6. Seek out, recognise, and value the knowledge, skills, and experience of others
7. focus on the "whys" - the purpose, and the outcome
8. create and protect time
9. Actively Listen
10. Using pauses effectively
11. Demonstrating empathy
12. 'Serving' the other person
13. Demonstrating Patience



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Orange - Active responsibility

Green - Compassion

Blue - Behaviours

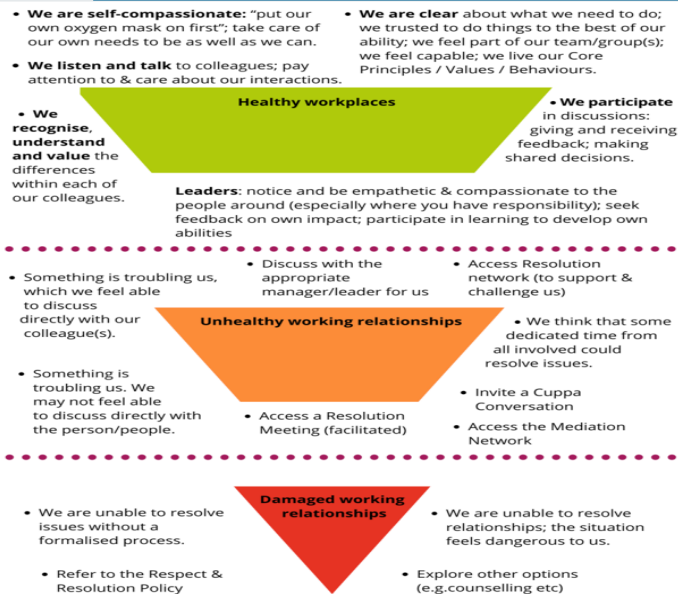


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Healthy working relationships

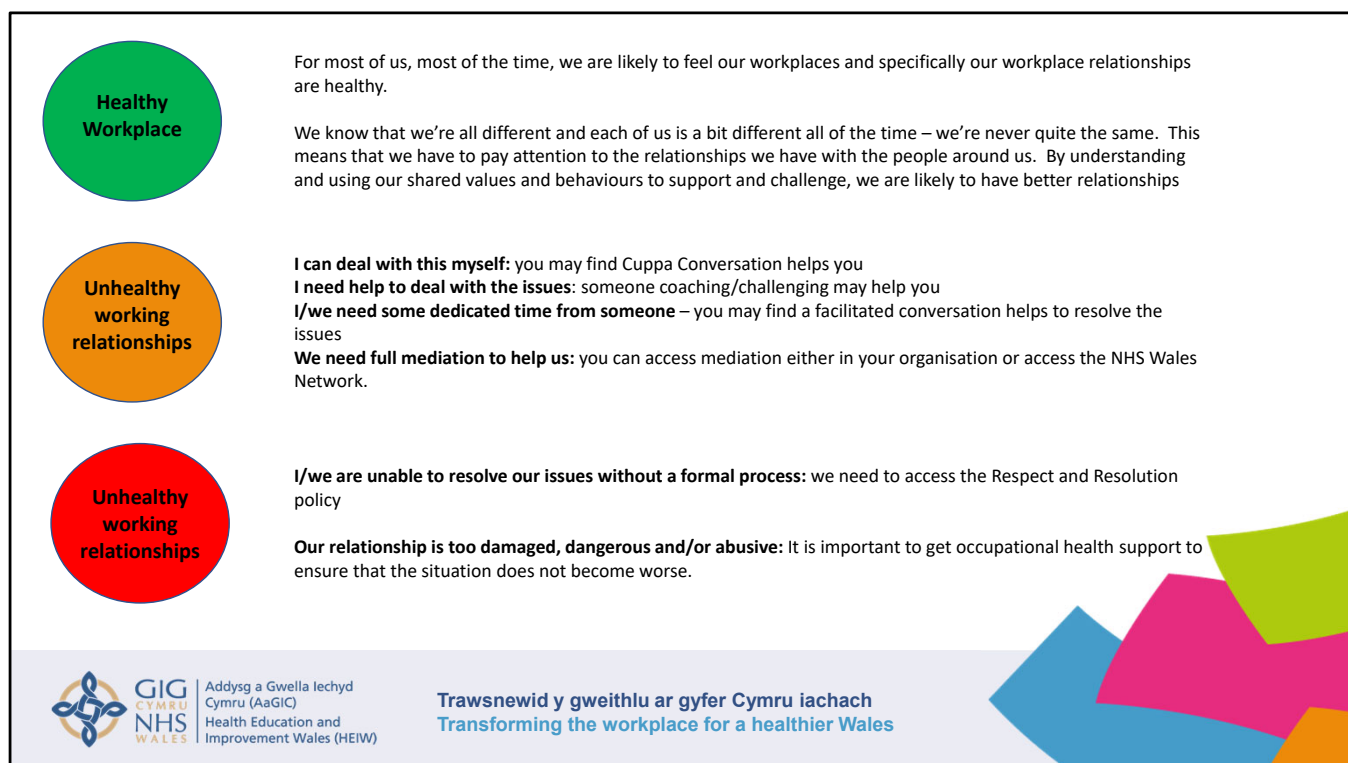
Promoting a coaching culture



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Support is available whatever the state of your relationship. There are a number of informal mechanisms that can be utilised, including the HEIW cuppa conversation initiative along with qualified coaches and mentors who can assist. Mediation can also be an informal intervention, facilitated either by your line manager, a member of the People Team or someone external to the organisation. HEIW has access to NHS Wales trained mediators, so you do not need to use someone internal if you would prefer.

If poor relationships are unable to be resolved using informal options, policies are available which implements a formal process which will involve support from the line manager and People Team. The offer of support to both parties is essential to help them manage what can be a very difficult and challenging time.



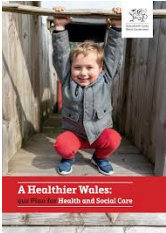
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**Ein Myfyrdodau
Our Reflections**

**Ein Penderfyniadau
Our Decisions**

**Ein Dyfodol
Our Future**



What's different?

It is good for us & our patients when we...

Listen, pay attention & talk to each other

Reflect: good, could be better & action

Get involved: in the survey & making decisions afterwards



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So now what?

Look at the results!

Talk to your colleagues

Decide what you're going to do next

Let other people know what they need to do to make your work/workplace better



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2021 and beyond?

Short simple more “surveys”

Leaders/teams measured on taking part:
In surveys & in follow-up conversations

More & better conversations
& relationships



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These simple questions may be useful to help this have conversations with our colleagues

How many people took part? How many didn't? Why was this?

How are we going to get people involved in the discussion/ decisions?

How closely do these group/organisational results reflect our own team experiences

What are we proud of in these results? What should we be celebrating?

Where are the things we think we can improve? What do we know?

What can we learn more about?

How can we improve our wellbeing?

What are the things we can decide/change ourselves?

What are we going to do?

How are we going to know we have changed things?

What are the things we need others to change? How are we going to tell them?

Is there anything else?

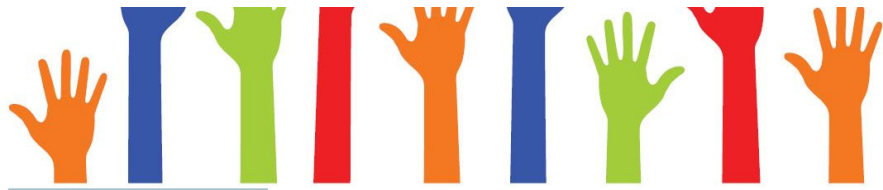


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You can use these prompts with your teams to encourage discussion, make change and improve relationships.



Get involved
make a difference!



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Health Education & Improvement Wales Coaching Contract

Coaching aims to *unlock a person's potential to maximise their own performance* (Gallway,1975).
HEIW'S organisational commitment to coaching is outlined within our values and behaviours;
Together as a team, Ideas that Improve and Respect for all.

This agreement is made between [client name] and [coach name] for a number of coaching sessions

It is the responsibility of both the coach and the coachee to review this contract together in an introductory session to ensure mutual understanding of the roles and responsibilities associated with this coaching relationship.

The Coach's Ethical Approach

The purpose of the coaching relationship is to support the coachee to achieve their goals. In this relationship, the coachee's agenda is at the heart of the relationship and will be worked on in partnership by both the coach and coachee. The style of coaching is non-directive. As your coach, I do not have the answers to your issues, but I am committed to working and supporting you to explore them and help you identify how you can move forward. Whilst I cannot guarantee results, I will always do my best to help you achieve the best for yourself. You will only get out of it what you put in.

I will treat and respect all that you choose to share with me in the strictest confidence. However, there may be times where something you share with me needs to be shared more widely, but we will discuss this first to ensure you are comfortable and, where possible, you will take the lead when sharing this information with others.

I may be required to share generic information regarding learning needs, how public services are faring generally or other points that can help inform further programmes. However, this information will not be shared unless I can guarantee complete confidentiality.

As an internal coach to NHS Wales, I work with a variety of people who may or may not be known to you. I will make you aware if there is likely to be a conflict of interest. Where we work together and there is knowledge of others, we will focus on your individual situation and your responsibilities. I will therefore maintain confidentiality and not refer to any situations or knowledge I have about these individuals gained from my interactions with them. No notes will be taken during the session, I will simply listen. I will also undertake regular professional coaching supervision.

Either the coachee or the coach is able to exit the coaching relationship without giving any reason, subject to appropriate notice being given

Name of Coach:

Signed: **Date**

Name of Coachee:

I agree that the primary purpose of this coaching contract is to support, maintain and enhance my personal development and performance over an agreed time period. As the coachee, I will select topics for discussion and pursue meaningful goals, be punctual and actively participate. I will commit, to the best of my ability, to the agreed objectives and action plan set out at the end of each session. I give the coach permission to challenge or use silence during our sessions.



Coaching is a non-therapeutic intervention intended for coachees who wish to enhance their performance or improve their work or personal situation. We have both agreed to the parameters of this relationship and discussed any practical implications to us.

We have agreed to meet every week/s for Each session will last a maximum of hours. We will schedule these sessions to coincide with specific pieces of work or situations, so that constructive feedback can be provided, and your objectives and action plan can be reviewed. The scheduling of these session will be jointly agreed by the coach and coachee. Coaching sessions can be rescheduled by either the coachee or the coach with [number of days] notice.

Our first coaching session will be on:

Date:

Time:

Venue:

If for any reason a session is cancelled, we will meet again at the earliest convenient date. The person who has cancelled is responsible for rescheduling the session. Coaches will have their own cancellation policy and will consider how many sessions can be cancelled before the relationship is reviewed with the coachee and termination is considered.

The coachee understands that agreeing to this coaching contract, responsibility sits with them. I will commit to completing any follow up actions that I agree to as part of our coaching sessions, within agreed timescales. All that we discuss will be treated with the strictest confidence, unless we agree that the information can be shared wider.

I agree to complete all evaluation forms during and following the final session.

I will ensure that sessions are scheduled so that they are no interruptions to enable me to provide you with my full attention and interaction.

Any changes in circumstance will necessitate the discussion and agreement of a new coaching contract.

The coach or coachee can request to terminate the agreement at any time if there is a break down in the coaching relationship, inadequate commitment to the process or a lack of satisfactory progress.

This contract will be referred to at the start of each coaching session.

I have read, and agree, this coaching contract.

Signed:

Coachee:

Date:

Coach:

Date:

Line Manager:

Date:



**Notes from meeting with James Moore, Assistant Director Organisational Design & Development
HEIW
Organisation's approach to coaching and mentoring**

Wednesday 8th February 2021

Present:

James Moore, Assistant Director Organisational Design & Development (JM)
Emma Carrington, Policy Project Lead (EC)
Ruth Taylor, Careers and Widening Access Advisor (RT)

RT and EC asked to meet with JM to understand the organisation's approach to coaching and mentoring as part of their CIPD studies. As a relatively new organisation, HEIW does not have an internal formal coaching and mentoring programme in place and therefore no policy. However, we may need a statement of intent that details a leaders' role is to listen and ask questions of all the employees / stakeholders we work with. HEIW should be much more of a coaching facilitating organisation as we don't do enough of that internally.

Behaviours we are trying to achieve across the NHS Wales include:

- 1.) Pause and Breathe (myself and others)
- 2.) Listen and ask questions (coaching style)
- 3.) Be kind and helpful to ourselves and each other (the premiss of compassionate leadership).

The following points were highlighted:

- There is a premiss of strategic shift – create an expectation within culture.
- Giving space (pause) asking the right questions to allow individuals to reflect; what would you like, what do you need others to do?
- Pause / Breathing Space / student experience / creating a coaching culture
- Create a coaching culture with a power shift that moves away from parent child scenario and gives individual choice (the premiss of coaching).
- Ensure that data is considered, and individuals feel listened too and considered.
- There is a danger that leadership have power and will not follow up on staff survey. We need to create a culture that follows up staff surveys (you said, we did). Asking questions of people benefits the organisation; what could you do that would help you have a healthy work life balance? What could other people do to help? Ask if individuals / teams would like support? Consider how many people took part / how many people had a discussion after.
- Coaching is fundamentally a mindset – I'm not trying to tell you what to do, I'm helping you work things out for yourself. Establish - Do you know better than other people or do they know best for themselves?
- Power shift – adopt positive psychology and allow individuals to come to their own conclusions – that was a great idea of mine! Open ended questions are so beneficial.

- Coaching and mentoring come from the assumption that individuals know themselves. The addition with mentoring is the knowledge, experience and advice that is shared with an individual. However, a mentor should always ask a mentees permission to share – would you like me to give you a bit of advice?
- Coaching requires people to open up and feel safe. That's really difficult to do in an organisation of less than 500 employees. If people want to access coaching, we need to do it as an NHS Wales approach or utilise the coaching and mentoring network (as part of public services Wales), rather than internally within HEIW.
- We need to create a culture where NHS employees feel safe however, there is currently a cultural divide between the Deanery and the NHS. A lack of Trust is evident within dysfunctional teams due to passed experiences. However, those employees that have joined the NHS externally since the start of the pandemic in March 2020 are highly satisfied with their experience. HEIW are still working to through the barriers to bring these the two silos together. It was acknowledged that organisations need high trust for internal coaching to work.
- Its much better to work across boundaries within NHS Wales as it's a small workforce. Its far more beneficial to find someone neutral.
- Distance helps; Individuals can get to emotionally invested if they know the coachee / coach – neutral relationship.
- Based on expectation – coach; supporting and challenging ad coachee participating and bringing their whole selves.
- Unpicking – somethings are external to work and a coachee may feel unconfutable discussing personal issues with a coach within the organisation.
- How do I really know you are going to keep this confidential?

Workplace evidence to reflect my ability to assist potential coachees/ mentees to understand and participate fully in coaching/mentoring programmes (LO2.4)

In August 2020, the Careers and Widening Access Team in HEIW appointed Rubecca to the new Careers and Widening Access Assistant role. I was asked to be her peer mentor and take the role of what Verlinden (2021) describes as someone to ask questions of, listen and push in the right direction.

I have worked in the NHS for almost 20 years, 2 ½ of which have been in HEIW. I therefore have a wealth of experience that I can share with Rubecca. I was also able to provide psychosocial support to her, which was of particular importance due to the pandemic and the need to work from home and other personal factors. Rubecca had personal worries relating to a vulnerable relative and also suffered a sudden bereavement. It was therefore important that I made time for her to help her manage her personal issues alongside her work commitments. To support the relationship I carried out regular informal check-ins and scheduled weekly one to one meetings and ensured Rubecca knew that she could contact me at any time should she need any advice, guidance or just a friendly ear.

During the initial few months of the relationship, I have been able to guide Rubecca through her tasks, explaining processes and procedures and the rationale behind decisions. I have also been able to help her understand how her roles fits in with the wider organisation. Providing her with this vital information has aided her to make decisions for herself and complete tasks to a high standard. I have been able to signpost her to documents associated with the organisation and our team, enabling her to learn for herself. I have then been on hand to answer any questions she has.

This relationship has also enabled me to share my knowledge to enable Rubecca to cover my duties during periods of absence. This ensures continuity and that the team continues to function effectively, remaining on target to meet its objectives.

She is now more confident in her role and able to challenge constructively, being equipped with a greater understanding of the organisation, our work stream and how they function. As our relationship has developed, Rubecca has become more confident to ask questions of others when she does not understand something.

Over recent months, our mentoring relationship has changed to a more reciprocal arrangement, where the relationship focuses on meeting the learning needs of us both (NHS England, 2014). Rubecca has considerable experience in event management and marketing, an area I am unfamiliar with. She has been able to share her expertise and knowledge with me which has increased my capabilities in this area considerably. She has also been able to offer me personal support and our relationship has developed to be one of high trust and respect, recognising our strengths and weaknesses and working together for mutual benefit.

References

NHS England (2014) *A Guide to Mentoring*. Available at: https://improvement.nhs.uk/documents/1862/NHS_England_Mentoring_Guide_5bv5_FINAL5d.pdf (Accessed: 27 January 2021)

Verlinden, N (2021) *The Power of Peer Mentoring in the Workplace (now and post COVID-19)*. Available at: <https://www.digitalhrtech.com/peer-mentoring/#def> (Accessed: 5 March 2021)

Ruth Taylor (HEIW)

From: Rebecca Williams (HEIW)
Sent: 07 January 2021 12:27
To: Ruth Taylor (HEIW)
Subject: RE: Meeting

Support from Ruth:

Although it may seem over the top, I've genuinely found Ruth to be an amazing beacon of support for me within HEIW!

Ruth kindly organised and led a series of introductory meetings with a number of teams within HEIW and I've found these to be really useful, particularly from the perspective of developing an understanding of where our teams connect.

Having someone to speak to has been really important to me, and Ruth has been outstanding in regard to this. Constantly at the end of Teams chats or calls, or an email, whatever I need Ruth goes out of her way to help and support me, whether that's answering my overload of questions, giving me advice, to useful information on upcoming conferences and documents – nothing is too much for Ruth and I really appreciate that.

Conscientious, motivated and a self-starter, Ruth helps to give me direction and I thoroughly enjoy working with her.

Thank you.

Rubeca Williams

Cynorthwy-ydd Gyrfaoedd ac Ehangu Mynediad | Careers and Widening Access Assistant

Addysg a Gwellu Iechyd Cymru (AaGIC) | Health Education and Improvement Wales (HEIW)

aagic.gig.cymru | heiw.nhs.wales



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🖨️ Helpwch arbed papur – oes angen i chi printio'r e-bost yma?
Help save paper - do you need to print this e mail?



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Health Education and
Improvement Wales (HEIW)

ILM Coaching and Mentoring Evaluation

Page 1: Page 1

We hope you have enjoyed undertaking your recent ILM course in Coaching and Mentoring. We would be grateful if you could spare 5 minutes to provide us with some feedback on your experiences and how you plan to use your new skills in your role in HEIW. This will help with the further develop of our coaching and mentoring programmes within HEIW.

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Page 3

1. Please confirm which level ILM Coaching and Mentoring Course you have undertaken.

* *Required*

- ☐ Level 3
- ☐ Level 5
- ☐ Level 7

2. Why did you decide to undertake the course? * *Required*

3. What did you hope to achieve from undertaking the course? * *Required*

4. How satisfied were you with the training you received?

- ☐ Extremely satisfied
- ☐ Quite Satisfied
- ☐ Satisfied
- ☐ Disatisfied
- ☐ Quite dissatisfied
- ☐ Extremely dissatisfied

Page 4

5. Please indicate to the level in which you agree with the following statements.

Please don't select more than 1 answer(s) per row.

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree
The course has increased my confidence	☐	☐	☐	☐	☐
I have learnt new skills	☐	☐	☐	☐	☐
My time management has improved	☐	☐	☐	☐	☐
I am more efficient	☐	☐	☐	☐	☐
I have better working relationships	☐	☐	☐	☐	☐

6. What did you find most useful about the training? * Required

7. What strengths have you developed? * Required

8. Have you been able to implement the new techniques you have learned within your working day to support yourself and colleagues? * *Required*

- ☐ Yes
- ☐ No

9. Please provide details

10. Has your understanding of coaching and mentoring changed since you have undertaken the course?

- ☐ Yes
- ☐ No

11. Please explain your answer

12. Has the training provided you with the confidence to fulfil the role of coach or mentor within HEIW?

- ☐ Yes
- ☐ No

13. Is there any aspect of coaching and mentoring that you would like further information or clarification? If yes, please provide details * Required

14. Do you foresee any barriers that may prevent you from carrying out your role as a HEIW coach/mentor now you are qualified?

15. Would you like your name to be added to the NHS Wales wide list of qualified coaches and mentors, enabling you to offer support to the wider NHS Wales workforce? * Required

- ☐ Yes
☐ No

15.a. If yes, please provide your name and NHS Wales email address.

16. Please add any comments you would like to share with regard to the training you have received or your future role as a coach/mentor.

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Page 5: Final page

Thank you for taking the time to provide your feedback. Your comments will help inform the future development of coaching and mentoring programmes within HEIW.



Skill gap analysis

Page 1: Page 1

HEIW is committed to supporting individuals to be the best they can. To help us achieve this, we are conducting a workplace skills analysis to identify the development needs of the organisation. This will allow us to identify common themes across the organisation and identify where there are opportunities to support our values by working as a team to improve individual and team abilities to perform at their best.

Our behaviours ask that we drive innovation and improvement for staff as well as patients and learners. To do this, we are looking to identify staff who have enhanced skills in workplace practices to become mentors to others and share their expertise and knowledge, to increase the skills within our organisation to support the delivery of our objectives. Not only with this help to provide staff with the skills and knowledge they need to perform their roles to their full potential, but offer proficiently skilled individuals to support their colleagues and develop their skills. Providing these opportunities within the organisation, will contribute to our values – together as a team and ideas that improve.

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1. Please select which of the following options you consider yourself to be with regard workplace skills and practices. * Required

Please don't select more than 1 answer(s) per row.

Please select at least 1 answer(s).

	No knowledge	Some knowledge	Sufficient knowledge	Significant knowledge	Expert knowledge
Microsoft Word	☐	☐	☐	☐	☐
Microsoft Excel	☐	☐	☐	☐	☐
Microsoft Powerpoint	☐	☐	☐	☐	☐
Databases	☐	☐	☐	☐	☐
Surveys	☐	☐	☐	☐	☐
Delivering presentations/public speaking	☐	☐	☐	☐	☐
Financial processes	☐	☐	☐	☐	☐
HR processes	☐	☐	☐	☐	☐
Project management	☐	☐	☐	☐	☐
Infographic design	☐	☐	☐	☐	☐
Coaching	☐	☐	☐	☐	☐
Mentoring	☐	☐	☐	☐	☐
Leadership	☐	☐	☐	☐	☐
Report writing	☐	☐	☐	☐	☐
External communications	☐	☐	☐	☐	☐
Social media for business use	☐	☐	☐	☐	☐
Website design	☐	☐	☐	☐	☐
Microsoft Teams	☐	☐	☐	☐	☐
SharePoint	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

2. If you selected other, please state what skill and your level of competency.

3. Would you like support and/or training to develop your skills in any of the above areas? * Required

- ☐ Yes
- ☐ No

4. Which area/s would you be most keen to develop?

- ☐ Microsoft Word
- ☐ Microsoft Excel
- ☐ Microsoft Powerpoint
- ☐ Databases
- ☐ Surveys
- ☐ Delivering presentations/public speaking
- ☐ Financial processes
- ☐ HR processes
- ☐ Project management
- ☐ Infographic design
- ☐ Coaching
- ☐ Mentoring
- ☐ Leadership
- ☐ Report writing
- ☐ External communications
- ☐ Social media for business use
- ☐ Website design
- ☐ Microsoft Teams
- ☐ SharePoint
- ☐ Other

5. If you selected other, please state

6. If you consider yourself to have significant or expert knowledge in any of the abovementioned workplace skills, would you be interested in undertaking a mentoring programme to enable you to share your knowledge and skills with other members of HEIW staff to support their development needs? *

Required

☐ Yes

☐ No

☐ N/A

7. Which area would you like to provide support with?

- ☐ Microsoft Word
- ☐ Microsoft Excel
- ☐ Microsoft Powerpoint
- ☐ Databases
- ☐ Surveys
- ☐ Delivering presentations/public speaking
- ☐ Financial processes
- ☐ HR processes
- ☐ Project management
- ☐ Infographic design
- ☐ Coaching
- ☐ Mentoring
- ☐ Leadership
- ☐ Report writing
- ☐ External communications
- ☐ Social media for business use
- ☐ Website design
- ☐ Microsoft Teams
- ☐ SharePoint
- ☐ Other

8. If you selected other, please state

9. Please provide your name and email address and the People Team will be in touch with you about developing your mentoring skills to support the wider organisation. * *Required*

Page 8: Final page

Thank you for taking the time to complete this survey.

Following evaluation of this survey, the People Team hope to be able to provide staff with learning opportunities to develop their skills and knowledge in these areas.

From: [Jeremy Ashdown \(HEIW\)](#)
To: [Ruth Taylor \(HEIW\)](#)
Cc: [Emma Carrington \(HEIW\)](#)
Subject: RE: Coaching and mentoring resource support
Date: 12 March 2021 16:41:37

Hi Both

Many thanks for our meeting and for kindly sending me this information. This is very comprehensive indeed and will be very helpful in evaluating our current coaching offer. The slides are very comprehensive and I will use these to support our future coaching offer and management development programmes.

Thanks again both for all of your support throughout. Hope that you have a great weekend.

With kind regards

Jeremy

From: Ruth Taylor (HEIW) <Ruth.Taylor@wales.nhs.uk>
Sent: 12 March 2021 12:34
To: Jeremy Ashdown (HEIW) <Jeremy.Ashdown@wales.nhs.uk>
Cc: Emma Carrington (HEIW) <Emma.Carrington@wales.nhs.uk>
Subject: Coaching and mentoring resource support

Hi Jeremy

Thank you for meeting with us this morning to discuss the resources we have developed following our discussion a few weeks ago.

Please find attached a slide pack, draft contract and two surveys.

BW

Ruth and Emma

Ruth Taylor

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