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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, appearing to be 'J. Thomas', written over a horizontal line.

J. Thomas

Date: 2nd June 2020

Contributing to Resourcing and Talent Planning in the Organisation

LO1/ 1.1 – Ateb's approach to talent planning

Ateb's approach to workforce and talent planning varies depending on the job role and department manager. There is no formal talent planning policy or process. However, Ateb recruits following a structured process with formal shortlisting, interview structure and questions, assessment centre and HR involvement to support managers and provide impartial advice.

When a role becomes vacant following voluntary or involuntary departure, the role will be filled either like-for-like or with minor changes which are determined through manager assumption and knowledge of their team and service area. However, where new roles are created or teams expanded, a business plan is developed to detail why the new role/expansion is required, structure changes and financial implications; the business case is shared with Board and the Executive Management Team for approval (EV1, EV2, EV3).

During the Covid-19 pandemic, Ateb continued business with no employees furloughed. New budgets have been developed based on assumptions of how Covid-19 will affect the business therefore, the Chief Executive communicating that we have the financial capacity and agile working technology for the workforce to continue work from home during this period. Recruitment and other activities have been suspended until further notice (EV4).

Ateb has an informative corporate website promoting the employer brand and supporting document 'The Vision' outlining our DNA, culture, values and leadership expectations in all roles (EV5); CIPD (2017) cite that candidates are drawn to corporate websites which promote their values and brand. Therefore, this will inform potential applicants allowing them to self-select by understanding our expectations.

Ateb tries to retain valuable talent, recently offering a permanent role with more responsibilities to retain an employee who had completed an apprentice scheme (EV6). Alternatively, actions are taken to either improve under-performing employees or remove employees who do not align with Ateb's future needs; this is done through performance improvement plans, later progressing to the capability process if improvement is not seen (EV7).

Formal succession planning is not completed however, with the appraisal framework (Achieve) conversations with line managers occur at least once a quarter, allowing staff to discuss their future aspirations and for managers to provide feedback and highlight any development goals. Wilkinson and Taylor (2016) note that appraisal meetings are central to succession planning by agreeing development plans and activities such as training to support the employee. Achieve is still in its infancy and does not solely focus on development however, this framework could lead to more formal succession plans in the future.

LO1/ 1.2 – Ateb's use of internal and external information to determine the future workforce needs

I have analysed Ateb's approach using internal and external information following the four stages of workforce planning namely; forecasting demand, forecasting supply, identifying gaps and addressing the gap (Wilkinson and Taylor, 2016). There is no formal process or policy to follow when **forecasting demand and supply or identifying and addressing gaps**, with managerial assumption used, plus internal and external information to inform decisions.

A systematic approach was taken when looking to restructure and expand the Facilities department whereby, a newly recruited Facilities Coordinator analysed past trends using internal reports and documents which identified many non-compliant areas due to be under-resourced; the manager then built a business case to increase resources in order to become compliant (EV8).

The manager in Ateb's commercial property development subsidiary continually used external information regarding the future of the housing market in response to the Covid-19 pandemic to inform future business activities. As a result, an active recruitment campaign for their department was suspended due to the uncertainty of the housing market (EV9).

The Customer Services department was transforming therefore, the department conducted a series of internal process mapping to streamline services and identify gaps; as such, one gap identified was within the Electrical Team highlighting a lack of electrical knowledge, skill and sufficient existing staff to support the team with the future demands forecasted. The Maintenance & Compliance Manager created a presentation to Board, a supporting report, cost considerations and future changes to electrical regulations using external information (EV1, EV2, EV3).

A manager within the front-line Customer Services Team often shares resources with the Maintenance & Compliance administrative team on an ad-hoc or secondment basis. The Customer Services Advisor (CSA) role is based within both departments therefore, when a skills gap is identified the manager will look at the skills resources within the team, determining if there is capacity to share the CSA with the required skillset with the other department. Furthermore, the manager often plans for demand working back against the salary budget; if demand increases, the manager will check for surplus budget and if possible, increase part-time hours or recruit a temporary worker (EV10).

As a result of the Covid-19 pandemic, a Welfare Team to support vulnerable customers was established by redeploying staff. The Digital Support Team was redeployed entirely (with their agreement), as the team's skill-set met the Welfare Team requirements. The team recognised a skill gap for customer service delivered in an empathetic and sensitive approach, and knowledge gap of employee information such as medical conditions relating to Covid-19 therefore, a Customer

Services Advisor and People Assistant with this skill and knowledge was redeployed (EV11). The skills analysis was completed informally using manager knowledge.

During the Covid-19 pandemic, a training analysis was completed via an external consultant using health and safety industry best practice, identifying we were non-compliant in various training areas therefore, highlighting skills and knowledge gaps. The consultant developed a large training matrix consisting of all Health & Safety training; to roll out e-learning to the entire workforce to become compliant and address training gaps upskilling the workforce, myself and my fellow People Advisor created an e-learning matrix (EV12) and communicated with the entire workforce to roll out essential training (EV13).

Ateb is an 'employer of choice' according to Higgs (2004) model; Ateb pays the median salary in external salary benchmarking (EV14) and treats employees well offering flexibility, financial reward and learning and development opportunities. When Ateb was improving its benefits such as annual leave and occupational sick pay, external information of what other benefits companies offered was reviewed to inform decisions.

LO1/ 1.3 – Conclusion – Ateb's approach to talent planning

In conclusion, Ateb's approach to talent planning is inconsistent across the workforce and very much depends on the activity and department as to how effectively talent planning is completed. Although no competency or skills analysis is formally completed, Ateb does strive to retain a workforce which aligns to organisational values and needs by retaining valued talent (EV6) and taking steps to remove staff who do not meet future needs. Ateb promotes the employer brand heavily with an informative corporate website and social media pages (EV15), plus public documents outlining the mission, values, strategic aims and DNA (EV5) therefore, appealing to potential applicants to attract the right talent. Skill gaps are informally analysed allowing Ateb to use its internal talent to share resources, provide secondments and redeployment into critical areas when needed (EV10, EV11) however, the approach to skills gap analysis is informal, inconsistent, based on manager assumption and knowledge. To be an employer of choice, Ateb pays well and treat staff well through benefits and rewards, using external information such as benchmarking or competitor information to inform their employment package (EV14).

However, more can be done to effectively conduct talent planning. Turnover is recorded every month, recording both involuntary and voluntary turnover (EV16) alongside an exit interview for departing staff (EV17) however, the cost of turnover is not calculated, and turnover is not used for talent planning. A generic competency framework is available detailing 12 characteristics and attributes every Ateb employee must have (EV18); these competencies are personalised for each role profile for further clarification (EV19). However, no analysis is completed against the required competencies to measure talent and identify gaps. External labour market

information is not sought therefore, recruitment is not planned with tight or loose labour markets in mind, or availability of skills or forecasted gaps. Focus on competitors is only those within the same product market, which is a small product market locally, with little or no focus on labour market competitors.

LO2 – Recommendations

CIPD (2020a) notes that it is important to be agile and prepared for future job needs therefore, carrying out a capability analysis will identify gaps between the existing capabilities within the workforce against the future requirements. Currently Ateb does not conduct capability analysis; skills gap analysis is completed ad-hoc informally but there is not consistency or defined process. Therefore, I recommend that Ateb conducts a formal capabilities analysis to understand the quality of the current workforce and be able to prepare and future-proof the workforce. All job roles were reviewed in 2019 and written into a new role profile format which outlines the required competencies, attributes and personal characteristics required for the role (EV19); as the competencies are up-to-date and accurate, the next step would be completing a skills analysis. Understanding the gap will allow Ateb to implement relevant strategies to close the gap such as, training or coaching, or used to plan future recruitment to attract new talent with the required skills (Wilkinson and Taylor, 2016). Furthermore, the skills analysis could highlight the most valuable employees to for succession planning or retention.

Currently Ateb records voluntary and involuntary turnover (EV16) however, this or external benchmarking data does not form part of talent planning. CIPD (2019a) advises organisations to understand the reasons for employee turnover as this information can form recruitment and retention initiatives. Therefore, I recommend Ateb takes a more detailed analysis of employee turnover; determining the levels of functional and dysfunctional levels, calculating the cost of turnover, and analyse exit interview information to fully understand the reasons for turnover. This will help Ateb to internally and externally benchmark turnover, develop strong business cases using financial figures, identify high areas of turnover cost which could be streamlined to reduce costs, and form retention strategies to directly impact common departure reasons (Wilkinson and Taylor, 2016; CIPD, 2019a).

Succession planning identifies and develops potential future leaders, individuals, and business-critical roles therefore, being able to effectively fill key-roles when they become vacant (CIPD, 2019b). With no formal succession planning at Ateb, I recommend implementing formal succession planning to avoid the organisation being vulnerable when departures occur but also nurture internal talent and developing people to build a 'home-grown' talent pool who will have the organisational knowledge and operational experience. Conversations about future aspirations and development with line managers can occur during the Achieve one-to-one however, the Achieve Framework is also on a wider scale such as setting short and long-term targets therefore, does not directly stipulate that this must be

discussed at the one-to-one. Therefore, this approach is inconsistent and likely that these conversations do not occur for all staff which could overlook valued talent or demoralise staff leading to departures. Wilkinson and Taylor (2016) recommend that succession planning is extended to the entire workforce to develop talent pools as opposed to specific individuals; also citing that the appraisal process is central to succession planning. I therefore advise that aspiration and development conversations are built-in to the Achieve framework as a mandatory measure ensuring all staff have the opportunity; this would be simple to implement and a good short-term solution until more formal measures or additional succession planning activities such as mentoring schemes, are developed.

LO3/ 3.1 – Rational for recruitment campaign

In January 2020 I conducted a recruitment and selection activity as the HR lead, supporting and working in conjunction with two managers from the Customer Services department. Due to a voluntary departure and a planned long-term sickness absence, there was a business need to recruit for two Customer Services Advisors to ensure service levels were maintained. As the position is based within Ateb's busy Contact Centre, it is crucial to ensure service levels are maintained to provide a first point of contact to customers.

LO3/ 3.1 – Roles and responsibilities

As HR lead, my role is to provide accurate, lawful, and impartial advice and provide support to the recruitment panel, alongside all administrative duties. The recruitment process at Ateb follows the same steps with shared responsibilities between HR lead and the recruitment panel; for managers who regularly recruit, they are aware of the process. In this case, the one of the department managers were newly appointed therefore, I explained the process and responsibilities, so the department manager was aware of the process and what roles everyone had.

When the recruitment campaign was requested, it was my responsibility to ensure I obtained the relevant information to proceed including; agreed role profile; information to produce advertising documents (recruitment pack, applicant letter and general advert (EV20)); agreed dates to start/close advert, shortlisting, interview, assessment and ideal appointment date; and determine panel chair as decision-maker. I requested this information from the department managers, and we worked together to determine mutually convenient dates.

I completed all administrative duties creating advertising documents, uploading the advert online, creating shortlisting and interview matrixes, and conducting all candidate correspondence.

I provided a shortlisting matrix against the 12 personal attributes and characteristics detailed in the role profile (EV21). The department managers and I all shortlisted separately (EV22) before meeting to compare our individual shortlist and confirm

candidates to shortlist for interview. I provided guidance and advice ensuring shortlisting is objective based on the information provided against the role criteria; the panel chair had the final decision on which candidates were shortlisted for interview.

The department managers both decided to interview and selected three stakeholders of the role to form an additional informal panel.

LO3/ 3.3 – Organisational/ legislative requirements

CIPD (2019b) advises having a structured interview process, using pre-planned interview questions focuses on required attributes for the role, and using a scoring system to rate the interview, in order to avoid quick judgements. Ateb's interview process reflect this whereby department managers plan interview questions and assessments in advance ensuring consistency; I provided advice and reviewed documents ensuring the questions and assessments meet the requirements of the job role and produced a scoring matrix to reflect the questions (EV23). At interview, we all asked a proportion of questions, with an opportunity at the end for the panel members or the candidate to ask further questions. Panel members and I scored the candidates at the end of each interview and we discussed the scores determining the best candidates.

Ateb does not have a formal written recruitment process however, I followed the recruitment expectations set out by the People & Communications department to provide a structured consistent process underpinned by best practice and legislative requirements.

As a Housing Association, we are bound to Housing Act legislation which provides restrictions to recruitment of family members and close associates of Board and employees. I ensured the application form included the required questions to identify conflicts (EV24).

CIPD (2020b) note that at every stage of the recruitment process diversity and inclusion must be considered, ensuring hidden bias is removed to promote inclusive recruitment methods; further stating all participants in the recruitment process are aware of relevant legislation and discrimination. As such, all managers receive inhouse training to raise awareness alongside, regular Equality and Diversity training, plus advice and guidance from the HR lead during recruitment. I attend employment law updates and toolbox talks with my manager to ensure we are aware of legislation updates.

For this recruitment we had an informal panel, namely "Coffee and Chat", consisting of stakeholders of the advertised role; the stakeholders were junior team members who had not been involved in recruitment previously therefore, I met with them beforehand to brief them on the process highlighting legislation and what could be deemed discriminatory (EV25); furthermore, I also detailed reminders on the

recruitment document for the informal panel (EV26). I reviewed all recruitment materials including advert, interview questions and assessment documents to ensure there is no reference to protected characteristics or have the potential for discrimination.

At interview, I checked the candidate's ID documents to ensure they have right to work status, complying with legislation, and proof of the relevant qualifications. I also asked candidates to inform me before the interview if they required adjustments (EV27) to ensure equality of opportunity.

ICO (ND) notes that General Data Protection Regulations (GDPR) require organisations to tell individuals when they collect personal data, how and why. Ateb provides a privacy policy informing candidates, before submitting an application, what information we hold, why, what we do with it and how long we retain it (EV28), ensuring we adhere to GDPR. I ensured I adhered to GDPR guidelines by only retaining necessary information and destroying information after the specified retained period.

LO3/ 3.4 – Planning and preparation

When planning the recruitment campaign, I mutually agreed dates with the department managers for advertising, shortlisting, interviewing and ideally appointment date, to ensure the availability of key stakeholders and using the dates to source available materials and resources.

I prepared all recruitment documents including advertising materials, shortlisting documents and interview packs, and conducted all candidate correspondence such as interview invites and offer letters; I diarised time to ensure I had the time to complete these tasks (EV29).

I diarised time on the agreed advertising start date to upload the advert to the various platforms; I uploaded the advert on the Applicant Tracking System, followed by Ateb's corporate website, Indeed and Ateb's social media platforms including Facebook and LinkedIn (EV30). We upload the advert to all platforms manually so it can be quite time consuming therefore, it is essential I plan time to meet the agreed timescales.

To ensure privacy, I pre-booked the required amount of meeting rooms to accommodate the interview, assessment and "Coffee and Chat" panel. I prepared the rooms ensuring it is comfortable and private with notices on doors informing passers-by to not disturb the meeting room. I also pre-booked technology required such as laptops for the assessment.

LO3/ 3.5 - Timescales

As a department, we have agreed timescales to complete recruitment activities ensuring we are able to balance a busy workload and excellent customer service to

internal and external customers alike (EV31). The timescales are listed below in *Table 1*.

Table 1

Timescale	Activity
Same day as requested	Provide documents for review to department managers such as, advertising materials and role profile.
Within 24 hours	Upload the advert to the agreed advertising platform, after document sign-off.
Within 24 hours	Provide completed shortlisting template after the advert has closed.
Within 24 hours	After agreeing shortlisted candidates, invite shortlisted candidates to interview.
Day before interview	Provide completed recruitment pack to interview panel by 12 noon.
Within 24 hours	Verbally provisionally offer the role to successful candidate(s), pending clearances.
Within 48 hours	Further to verbal provisional offer, send a hard-copy provisional offer including supporting documents regarding clearances.
Within 48 hours	Further to interview, send regret notices to unsuccessful candidates.
After interviews	Set digital shared reminders to destroy paper and electronic information within retention period as specified by GDPR.
Within 2 weeks	Provide feedback to candidates who have requested feedback.
After interview	Send survey to recruitment panel to gain feedback about recruitment process.
Within 1 month	Update recruitment service hub
Before or on Day 1 of appointment	Provide Statement of Main Terms and Conditions no later than day 1 of employment to comply with employment legislation.

For this recruitment campaign, all timescales were met with the exception of sending regret notices to unsuccessful candidates which unfortunately took up to 72 hours from interview. There was similar administrative roles being prepared for advert at the time of these interviews; before regretting unsuccessful candidates, I checked with the department managers of the other administrative roles if they were interested in certain candidates, if so, I would be able to offer the unsuccessful candidate to transfer their application. The department managers were happy with the timescales I adhered to and understood the delay in regretting unsuccessful candidates.

LO3/ 3.6 - Reflection

On reflection, I feel this recruitment campaign was successful and achieved the objective of appointing two vacant positions with the talent which reflect the role requirements but also aligning with Ateb's DNA.

As this position generally generates high-volume of applications which is more time-consuming, I feel better organisation and streamlined processes would help. A template to plan the recruitment campaign including dates and required resources would ensure no information is missed and the information is held in one place for

ease. Furthermore, the shortlisting process is lengthy as the application is reviewed against 12 personal attributes and characteristics. Further to this recruitment campaign, we have created new documents to streamline the process including a recruitment request form containing all recruitment campaign information and shortlisting matrix with streamlined criteria; these documents are in trial process (EV32).

Also due to the high-volume of applications, there were 7 back-to-back interviews with a short break for lunch however, interviews overran which extended the day and reduced the break time. As a result, the interview panel were fatigued by the final interviews. On reflection, the interviews would be best either spread over two days or given longer time slots and frequent breaks. I discussed this with the department managers who also agreed.

Upon verbal conversation, the department managers were happy with the recruitment service provided including timescales, documents and advice and guidance provided. I sent a survey to the department managers to obtain their feedback about the service; one department manager replied with positive ratings however, did note he would have benefited if I provided an overview of the process as he was a new member of staff (EV33). I did provide an overview of the process which I felt was thorough and supported the department manager throughout the process however, on reflection I should have confirmed if he felt the overview was adequate and if he needed more information.

As part of department expectations, we survey all interviewed candidates to gain their views on the recruitment process from an applicant perspective. The response rate is usually extremely low therefore, on this occasion, I agreed with my manager to survey on the interview day to gain a full response. The survey responses were all positive with no negative feedback (EV34); whilst this is good, I feel it is not a true representation of candidate feedback as they may have felt obligated to provide positive feedback as negative feedback may be of detriment to their success at interview. In future, I will continue to send the survey after interview however, I will encourage the survey at interview but highlighting their response has no impact on their success.

Candidate feedback is fed back to my manager and I record the information on the service hub which forms quarterly reports for Executive Manager and Board. I verbally informed my manager of my survey responses from the department manager, as this information is not recorded on the service hub at present. If we receive negative feedback, we discuss this determining its validity and how to implement actions to improve if possible. I also report candidate feedback to the recruitment panel and department managers if appropriate; for example, a previous candidate noted that they felt the assessment was not structured and did not provide ample opportunity to showcase their skills. I provided this feedback to the manager

who on reflection agreed therefore, I supported the manager to amend the assessment to make it more tangible and reduce the risk of complaint.

Jane Nutland – Contact Centre Coordinator was the recruitment chair for the campaign I am referring to. I have enclosed a witness testimony to support learning outcome 3 – please refer to EV35.

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CIPD Candidate evidence matrix

(CEM1)

Candidate name: Joanne Thomas				CIPD Membership/registration No.: 53274130		
Qualification title: CIPD Diploma in Applied Human Resources				Unique Learner No. (ULN): 1403229		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5ART P	Contributing to Resourcing and Talent Planning in the Organisation	LO1	Extracts from presentation delivered to Ateb's Board regarding transforming the Customer Services team and structure.	EV1		
		LO1	Extracts from report delivered to Board proposing transforming the Customer Services department.	EV2		
		LO1	Financial costs to support business case documents.	EV3		
		LO1	Budget communication regarding Covid-19.	EV4		
		LO1	Extracts from 'Vision' document detailing DNA, culture, values and leadership expectations.	EV5		
		LO1	Witness Testimony – Steve Townley, ICT Performance Manager	EV6		
		LO1	Extract from Capability Procedure.	EV7		
		LO1	Witness Testimony – Pete Clearly, Estates Coordinator	EV8		
		LO1	Email and supporting document from Matthew Owens – Mill Bay Homes Operations Manager, suspending recruitment due to uncertainty in Housing Market.	EV9		
		LO1	Witness Testimony – Jane Nutland, Customer Services Coordinator.	EV10		

		LO1	Witness Testimony – Tom Waters, Digital Support Coordinator (redeployed Welfare Team Lead).	EV11		
		LO1	Extract of e-Learning matrix.	EV12		
		LO1	E-mail sent to employee detailing e-Learning requirements.	EV13		
		LO1	How Ateb determines pay, demonstrating external benchmarking for median pay.	EV14		
		LO1	Extracts from Ateb's corporate website and social media platforms demonstrating employer brand.	EV15		
		LO1/ LO2	Extract of turnover record.	EV16		
		LO1	Exit Survey – template.	EV17		
		LO1	Ateb's 12 competencies all employees must have.	EV18		
		LO1/ LO2	Extract from role profile sample detailing 12 competencies tailored to the role.	EV19		
		LO3	Extract of recruitment advertising material I prepared.	EV20		
		LO3	Extract of shortlisting matrix I prepared (names removed for confidentiality).	EV21		
		LO3	Extract of shortlisting matrix with scores and reasons I completed (names removed for confidentiality).	EV22		
		LO3	Extract of interview questions I reviewed and agreed and interview matrix I prepared.	EV23		
		LO3	Extract of application form I prepared demonstrating questions were asked to identify conflict with housing association legislation	EV24		
		LO3	Witness Testimony – Evelyn Calveley, Customer Service Administration Assistant.	EV25		
		LO3	“Coffee and Chat” template with reminders about what can be discriminatory.	EV26		

		LO3	Extract from Applicant Tracking System messaging system, demonstrating offer for adjustments at interview.	EV27		
		LO3	Extract from privacy notice for applicants.	EV28		
		LO3	Diary entry demonstrating I organised my time to prepare recruitment documents.	EV29		
		LO3	Extract from advertising platforms – corporate website not included as this is removed after the closing date.	EV30		
		LO3	Departmental timescale expectations.	EV31		
		LO3	Extract of new recruitment forms which are being trialled.	EV32		
		LO3	Feedback from department manager of recruitment campaign.	EV33		
		LO3	Applicant feedback	EV34		
		LO3	Witness Testimony – Jane Nutland, Customer Services Coordinator, supporting my statement in Learning Outcome 3.	EV35		

Candidate declaration:

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

Signature:



Date:

2nd June 2020

Notes on candidate evidence matrices

Candidates should be encouraged to develop a matrix indicating how their evidence relates to each unit/module and learning outcomes/assessment criteria. This helps advisors and assessors to support candidates to draw links between units and encourage cross-referencing and the possible multi-use of evidence.

Evidence matrices can be developed using the unit/module and learning outcomes/assessment criteria, giving candidates an opportunity to link their evidence to each outcome.

Another approach is to have a more generic form where candidates list evidence and tick relevant boxes to show coverage.

Whatever approach is employed candidates should be encouraged to complete these forms themselves and not expect assessors to do this for them.

Extracts from presentation delivered to Ateb's Board regarding transforming Customer Services



Service Delivery

To meet these ambitions we considered how we could deliver our service outcomes in terms of:

- Processes
- Data
- ICT
- Resourcing



Service Areas

SA/06 – Compliance works

- No defined processes with exception of gas safety
- No ICT systems and reliance on spread sheets
- Lack of clarity on roles and responsibilities

Improvements identified

- Processes to be developed and validated
- Off the shelf ICT solution to be implemented
- Compliance team to be created and roles and responsibilities defined



Service Areas

SA/05 – Shared Spaces

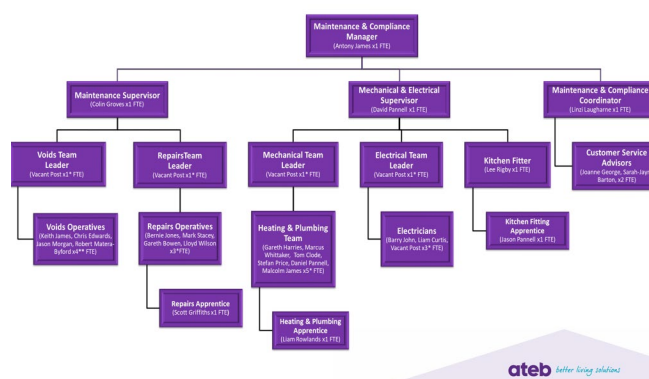
- No clear or consistent processes
- No ICT systems being effectively used
- No dedicated staff resource

Improvements identified

- Processes to be developed
- ICT systems to be developed through digital transformation project
- Dedicated lead resource to be appointed and team created

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Maintenance & Compliance Team



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Next Steps

- Outcomes of review presented to ateb Board in July
- Outcomes presented to teams early August
- Communicate outcomes across wider group by end of August
- New Customer Directorate launched during September
- Monitor progress against agreed actions

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Extracts from report delivered to Board proposing transforming the Customer Services department



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- Directorate service Areas
- Improvement Plan
- Team Structure Charts

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Introduction

In August 2018 we launched a piece of work aimed at exploring how we implement The Service Delivery Plan (SDP) and our commitment to meeting customer expectation at first contact wherever we can, and where we can't, how we will quickly aim to meet customer expectation through a case managed second point of contact.

To meet this ambition, we considered how we could deliver our service outcomes in terms of:

1. Processes
2. Data
3. ICT
4. Resourcing

The original proposal detailed the high-level vision of how we might structure our resources to meet our service expectation ambitions and allow us to re-address our processes, data and ICT requirements.

Over a period of 7 months from September 2018 to March 2019 a total of 8 days were spent with the team's process mapping the key customer areas, with a further 5 days of time away with teams across the directorate exploring how we could improve our customer service.

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Strategic Context

Our vision and its 5 supporting documents provided the framework within which we undertook this piece of work.



#1 Expect – central to the work we undertook was ensuring that we considered our customer commitment - "We will always aim to deliver...the right service outcomes, efficiently with great customer experience for the people and communities of West Wales"

#2 DNA – our DNA focuses on trust, togetherness and empowerment,

- #InYouWeTrust
- #AccessAllAreas
- #GetThingsDone

#3 Plan - the work was undertaken as part of delivering on our strategic aim 2 – Improve Service Delivery;

- Customers - We must always deliver the right outcomes, efficiently with great customer experience
- People - We must attract and retain the right skills, experience and enthusiasm
- Systems - We need to have the right process and infrastructure to be high performing.

#4 Deliver - as the operational tool that we will use to improve and grow our services a focus of the work we undertook was to understand what we needed to do and change to be able to fully implement the Service Delivery Plan

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#5 Assure – whilst we did not specifically consider assurance and risk the work that was undertaken will inform the rollout of a new assurance framework

Finance

It was acknowledged that there are likely to be cost implications when implementing some of the transformational changes proposed. Where it is identified that there are additional costs that are in excess of budget as assumed in the Business Plan, these changes will be subject to a business case that will require approval.

Process Mapping

The 10 key customer contact service areas were process mapped. This helped to inform the resources and digital solutions required. The key findings from this exercise were:

SA/01 – Letting

- Processes were well defined and detailed within Choice Based Homes Pembrokeshire procedures and Welsh Government home ownership initiatives guidelines
- Some ICT Systems were shared with Pembrokeshire County Council and Wales and West Housing Association with no opportunity to adapt without joint agreement
- There was no dedicated staff resource and therefore a risk of inconsistencies in approach. Senior management were very involved in day to day delivery particularly in relation to home ownership initiatives

SA/02 – Income Collection

- Processes were well defined following a significant piece of work completed in readiness for Universal Credit rollout
- ICT systems were in the process of being developed across 3 phases with the support of Wakefield District Housing (WDH) but had not progressed beyond phase 1 due to WDH pulling out of our agreement with them
- The team structure had recently been reviewed and changed in readiness for Universal Credit rollout.

SA/03 – Customer Advice & Support

- Processes were not defined and the first contact approach not embedded, escalation processes were unclear
- ICT systems were generally identified as poor with costly and unreliable support from Capita when wanting to make changes

Transforming our Customer Service | July 2019 | Page 5

6. Maintenance and Compliance team

Key responsibilities: managing the overall service outcome of the following service areas:

- SA/04 – Maintenance
- SA/06 – Compliance works

It is proposed that the following changes are made to the structure of the team to achieve their objectives (job titles will also be reviewed to reflect the broader changes):

- The Business Applications Co-ordinator role will be deleted and the new role of Compliance and Maintenance Co-ordinator created.

Transforming our Customer Service | July 2019 | Page 10

- We will aim to employ electricians to bring testing in-house, x1 Team Leader and a minimum x1 additional electrician
- We will not fill the vacant Maintenance Supervisor role and instead create a tier of Team Leaders x3 from within the existing team and x1 additional repairs operative

Transforming our Customer Services Customer Directorate Improvement Plan

SA/04	Maintenance	The team identified that following changes to team roles and responsibilities there was no defined process for escalating issues to Area Officers.	We will refine the process maps for this area to ensure the role of the Area Officer team is clear and provides the best possible service to our customers.	Antony James 30 th Nov. 2019
		The team identified that there was no defined process or systems for customer own home improvements and recharges.	We will develop process maps that define processes and clarify roles and responsibilities.	Antony James 30 th Nov.. 2019
		The team identified that we do not have a programme of servicing components such as windows and doors and thus minimising reactive and emergency repairs.	We will review our approach to servicing and maintaining components.	Antony James 31 st March 2020
		The team identified that there is a lack of quality control of works completed internally and by contractors.	We will explore with Property Services colleagues how we could develop a process for quality control and identify any resource required.	Antony James 31 st Dec. 2019
		The team identified that budget cost codes do not truly represent areas of spend and that there needs to be a shared ownership of budgets with housing colleagues.	We will work with our finance colleagues to better understand areas of income and spend.	Antony James 30 th Nov. 2019
		The team identified that external contract management needs to improve.	We will develop a system for capturing customer feedback and using this information along with inspections of works carried out to inform regular meetings with our contractors.	Antony James 30 th Nov. 2019

Financial costs to support business case documents in EV1/EV2 (information redacted for confidentiality)

Cost Considerations for Expanding ateb's Electrical Services Team

As a background, the existing EICR contract expired in April and the contractor has agreed to 'roll on' with the contract pricing (Judith and I meet with him every quarter). A combination of time constraints, the need to review the specification and talk of expanding the electrical services team has meant that we have not gone out to tender.

The contract specification has been reviewed and updated (attached) in light of the changes to BS7671:2018 and the increased spotlight on this area of compliance. This has resulted in an increase of EICR (C2 and FI) observations and unsatisfactory certificates that require follow-on electrical repairs to be completed.

The specification is now much more prescriptive than the previous one so it will inevitably cost more to deliver. Therefore to compare the cost of delivery it isn't just a case of looking at what we have spent with [REDACTED] and compare that to what we know additional electricians will cost us so I have asked the 3 contractors that we have been using for prices for new and updated items in the specification.

I've created an average cost per domestic test and for non-domestic per circuits (based on 88 communal areas with an average of 20 circuits per site).

Based on this, the estimated costs will be [REDACTED] which is comparable to the current internal recharge rate for 2 electricians [REDACTED]

However, we spent [REDACTED] with [REDACTED] in 18/19 but that includes some day to day repairs and materials and labour for repairs required as a result of carrying out EICRs.

Quote Analysis - Electrical Installation Testing

Description				Averages	vat @	Cost Per Item	Units pa	Cost
Periodic Inspection and Testing of Domestic Electrical Installations within Housing Stock								
Non-Domestic Circuit inspection and test inspection and test rate per circuit								
Supply and install replacement Non combustible consumer unit (including all residual current devices, miniature circuit breakers or RCBO units, blanking plates and fire stopping, etc) Inspected, tested and certified with Electrical Installation Certificate								
Hourly rate (for all works outside the scope of the above items)								
Hourly rate (out of hours and in hours emergency response)								
Material Nett trade prices +								
Supply and Fit Smoke/Heat Detector replacement (base & head) per unit								
Supply, fit and certify a 13-amp 2 Gang RCD (30 m.A.) Socket Outlet								
In-Service Inspection and Testing (PAT) of Specified Ateb owned electrical equipment (per item)								
	21.50	21.50			20.50	25.00		

ateb New budgets for FY 20/21

Our 3 Boards have agreed new budgets for this year based on the following high-level assumptions of how Coronavirus will likely effect our customers, our service offer, our teams and our partners. We looked at the year in terms of 3 periods and what each period would mean to those likely to be affected, the periods are:

Period 1 – April to June – Lockdown: Heavy restrictions on people, business and communities.

Period 2 – July to September – Transition: Slow release of restriction and more business activities.

Period 3 – October to March – Recovery: A gradual movement back to 'normal' business and people movements.

All the new budgets show that our companies can sustain services and team resources through the year assuming our prudent assumptions made for period of disruption are not greatly exceeded. This should give everyone a great deal of assurance in our ability to continue to work to serve our customers in a difficult environment for all.



**"Difficult times ahead
but new budgets offer
reassurance that the
group can continue to
create better
living solutions."**

ateb New budgets for FY 20/21

We should recognise that the predications for the economy generally are not positive, it is almost certain that there will be a severe recession meaning financial difficulties, unemployment and the accompanying hardships on people and communities of an economic downturn. It will be important for us all more than ever to be there for our customers and communities and find new ways to 'get things done'.

All new recruitment, land purchases and site starts have been suspended for period 1, Board will review this position at the end of period 1 and then again at the end of period 2. The budgets have also made provision for increased works through period 2 and 3 as we start to try and catch up.

It will be critical that we monitor and recognise trends throughout this difficult year, so we have developed a range of new key measures linked to triggers that will hopefully give us early warning advice on trends; the sooner we know, the sooner we can make the right decisions.

"Monitoring key areas of our business and spotting trends early will be critical."

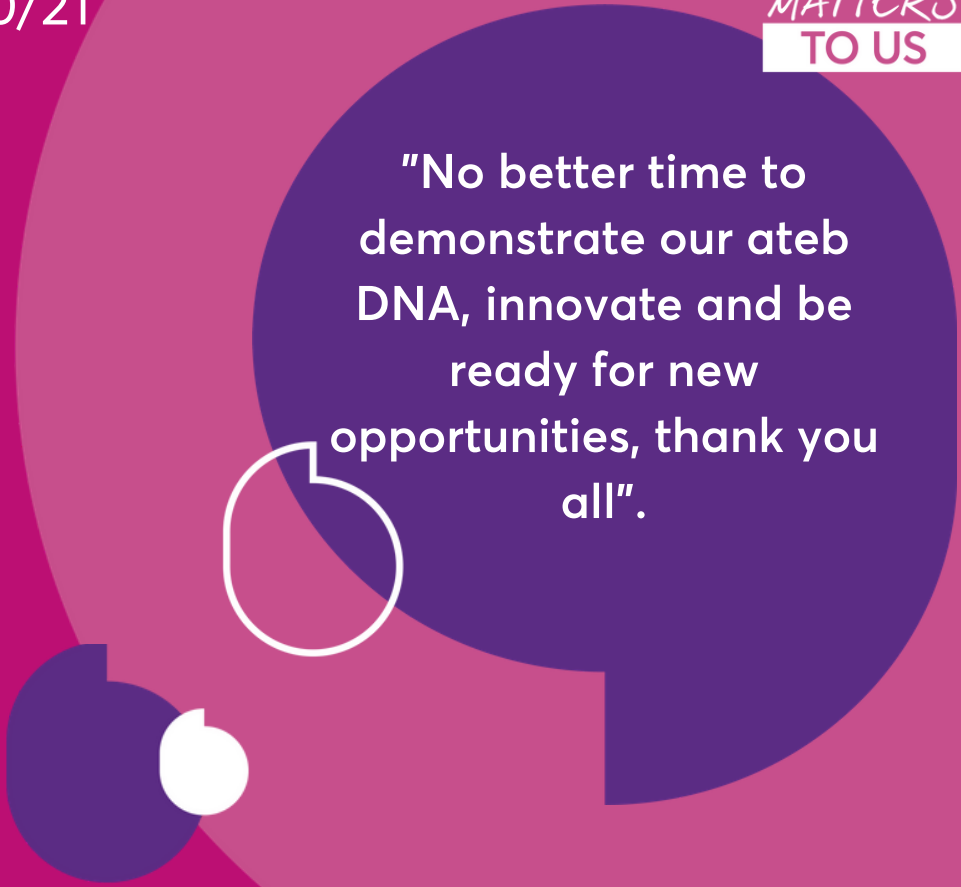
ateb New budgets for FY 20/21

Board will be reviewing the potential of a cost of living award and a PIP award over the next month with any proposed adjustments back dated to the start of the year.

We will also amend our strategic plan priorities for this year but want to emphasise that we cannot stand still, we need to continue to invest in the team and systems to ensure we can give our best to our customers. We will need to be innovative, flexible and agile in our thinking to turn a difficult period into the start of something better.

The Board and EMT would once again like to thank all our customers for their understanding, our teams for their resolve and our partners for their support.

Nick



"No better time to demonstrate our ateb DNA, innovate and be ready for new opportunities, thank you all".

Extracts from 'Vision' document detailing DNA, culture, values and leadership expectations



9/ Purpose

Our purpose:

The ateb group (where ateb means answer or solution in Welsh) is a unique set of companies that collectively has the shared purpose of...

Creating better living solutions...

For the **people** and **communities** of West Wales.

ateb better living solutions



13/ DNA

if it matters to you, it matters to us !

We believe that having the right culture is important to our performance and success.

We aspire to a culture or DNA that has:

- An inspiring vision and strategy
- Positive inclusion and participation
- Enthusiastic teams and collaborative working
- Support and autonomy for staff to innovate

Our DNA will help us to deliver a **great service to our customers**, utilise our resources efficiently, develop ourselves and others, collaborate with partners and have fun making a difference.

#InYouWeTrust
#AccessAllAreas
#GetThingsDone

ateb better living solutions

What's in our DNA?

#InYouWeTrust

Trust is the essential building block to our organisation, without it, things just won't be as good. We will be **open** in our approach so that we can learn from each other's experiences and we will **care** about what we do and how we do it.

#AccessAllAreas

We will be **inclusive** in everything we do as diversity of background, experiences, skills and views enrich our work and services. We know we will need help, so we will seek out and sustain strong **collaborative** arrangements with our partners and stakeholders.

#GetThingsDone

We will take **ownership** of our customer outcomes and be accountable for our actions. We will have a **proactive** attitude and always seek to be **innovative** and improve what we do.

Things change, so we must always be **flexible** to adapt to situations and make sure that we are always delivering the right outcomes, efficiently with great customer experience.

The ateb group leadership hierarchy is as follows:



ateb group will continually develop its leadership style. We have the following leadership groupings within our team structure:

Level	Title	Leadership Role
1	Board	Governance
2	Chief Executive	Overall leadership framework responsibility
3	Director	Leads on the development and translation of strategic priorities to meet our strategic aims
4	Manager	Leads one or more service areas as detailed in the Service Delivery Plan
5	Team or Service Leader	Leads a particular team or service
6	Delivery Leads	Leads on aspects of service delivery

ateb group recognises that great leadership must exist throughout the organisation. The leadership hierarchy must encourage a leadership style throughout the ateb group that:

- > Promotes our Purpose
- > Supports our DNA
- > Sets clear outcomes for our efforts
- > Defines operating boundaries and risk
- > Promotes learning over failure
- > Supports colleagues to experiment to achieve more
- > Appreciates colleagues' achievements, efforts and commitment

We believe that good leaders will always:

- 1/ Pay **attention** to people
- 2/ **Understand** people needs
- 3/ Show **empathy** in their response
- 4/ Help to **resolve** issues

All our people will need to demonstrate the following personal characteristics and attributes appropriate to their role and their leadership group:

Technical Competency We will make sure we have the right skills and expertise	Decision Making We need people throughout our organisation to make the right decisions at the right time	People Management We must always get the best from our people	Team Working So much more can be achieved through good team work	Financial Control To help as many people as we can we must be financially aware and astute	Communication Is the glue that will keep our organisation together
Organisational Skills Agility and flexibility can only be achieved through well organised and connected systems	Innovation To make our resources go further, we need to be thinking... What If?	Customer Service Is at the heart of what we do, we are a customer service focused organisation	Project/Process Management Improvement can only be embedded where there is effective project management	Enthusiasm We are here to make a difference, not to make up the numbers	Technology Competency In our fast moving digital world we must be technologically adept

if it matters to you, it matters to us ... **Our shared committment**

What our customers should expect ...

Above all, we will continually strive to deliver...
 the right **outcomes, efficiently**
 with **great customer experience...**
 for the people and communities of West Wales.

From: Steve Townley
To: Joanne Thomas
Subject: Witness Testimony
Date: 26 May 2020 14:43:38

I managed our ICT Apprentice, Adam, from the start of his apprenticeship, giving him guidance and support with his college studies providing experience, advice and guidance to develop his knowledge and skills.

At the end of Adam's apprenticeship, his fixed-term contract was extended continuing in a junior role but unfortunately at the time we were not able to offer him anything more substantial.

Due to this, Adam secured a permanent role in ICT with another company. Adam was a fantastic apprentice who demonstrated substantial professional growth and he exhibited all the personal attributes of an Ateb employee, it was obvious he has lots of potential. Adam was with us for two years by this point and he had learnt about all our of our ICT infrastructure and had built good working relationships with staff and the team, providing also excellent Service Desk support and it would have been a big loss to the ICT team and Ateb to lose Adam.

I approached the Executive Management Team with a proposal to keep Adam in our team to retain his skills and knowledge at Ateb, and I developed a new role profile for a permanent ICT Support Assistant which would continue to support our team but also utilising the full extent of Adam's skills developed during his apprenticeship.

We are going through a Digital Transformation transition so this role was well placed to also support this. The Executive Management Team agreed to the proposal and new role profile which was then externally benchmarked and fully approved.

This new role was offered to Adam who accepted and now continues to support our ICT team. Adam has since continued to provide a great service and continually practices professional development through independent study and in-house knowledge sharing with his colleagues. He has also been a enormous support whilst moving the workforce to homeworking during the COVID-19 pandemic.

It has already proved worthwhile to retain his talent and we will no doubt continue to benefit from this in the future.

Regards

Steve Townley
ICT Performance Manager



Tel | [01437 763688](tel:01437763688)
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhwch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

Extract from Capability Procedure



Capability Procedure

Introduction

- 1/ The purpose of this document is to provide a framework for dealing with cases where employees fail to meet the standard of performance expected of them.
- 2/ This procedure will apply to all ateb, West Wales Care & Repair and Mill Bay Homes Ltd ("the Group") staff that are no longer in their probationary period.
- 3/ The Group is committed to offering guidance and early assistance with the primary concern being to help the individual whose performance and/or behaviour is affected.

Definition

- 4/ The Employment Rights Act 1996 states that "capability, in relation to an employee, means the capability assessed by reference to skill, aptitude, health or any other physical or mental quality." Section 98 (2)(A) of the Act also indicates that "incapability must relate to the work or the kind of work that the employee was employed by the employer to do."
- 5/ Incapability, for the purpose of this procedure, is defined as continued poor job performance in relation to skill and ability.

Application & Exclusions

- 6/ There are a number of factors that may affect an employee's performance (Appendix 1) and careful consideration should be given to the root cause of the performance issue. The factors put forward by an employee, where those factors are supported by evidence, should also be taken into account and considered appropriately.
- 7/ Concerns about misconduct should be addressed through the Disciplinary Procedure. Unsatisfactory performance caused by carelessness, lack of effort, negligence, poor behaviour or attitude may not be a capability issue but may be a misconduct issue which would then be addressed under the Group's Disciplinary Procedure.
- 8/ Cases of poor performance due to ill-health and absence should initially be dealt with through the Group's Absence Management Procedure.
- 9/ Issues regarding poor performance that occur during an employee's probationary period should be investigated using the Group's Probationary Period Procedure.

Capability Procedure 1 of 9
Version 3: September 2018
Review: 2020



Right to be accompanied at hearings

- 10/ Employees may bring a companion to any capability hearing or appeal hearing under this procedure. The companion may be either a colleague or trade union representative. Employees must let the HR Manager know who their chosen companion is in advance of the hearing. If the choice of companion is unreasonable the Group may require the employee to choose someone else.
- 11/ The companion will not be allowed to answer questions on behalf of the employee but they may confer privately with the employee at any time during the hearing.
- 12/ If the employee or their choice of companion cannot attend the hearing the employee must inform the HR Manager immediately and an alternative hearing date will be made. Only one postponement will be granted.

Procedure – Informal Stage

- 13/ Performance issues will normally be dealt with informally first as part of day-to-day management. Where appropriate, a note of any such informal discussions may be placed on the employee's personnel file and will be used to provide context to the issue/s being considered. The formal procedure will be used for more serious cases, or in any case where an earlier informal discussion has not resulted in a satisfactory improvement.
- 14/ If deemed necessary the manager may use a Performance Improvement Plan (PIP). The PIP (Appendix 2) will set out in writing the current shortfalls in performance, desired outcomes and methods for achieving these as well as an agreed timescale (the review period) in which the objectives should be met. A copy of the PIP should be sent to the HR Manager for the staff member's personal file.
- 15/ The employee's progress should be monitored regularly during the review period and amendments to the PIP made if necessary with the employee. At the end of the review period the manager has the following options available:

- No further action as the employee's performance has improved to an acceptable standard
- An extension to the PIP period to see whether the employee can meet the required standard
- A progression to a Capability Hearing if no significant improvement is evident without good reason.

Capability Hearing Procedure

Capability Procedure 2 of 9
Version 3: September 2018
Review: 2020



consider any information obtained before the hearing is reconvened.

- The employee will be informed in writing of the panel's decision and reasons for it, usually within one week of the capability hearing.

Hearing Outcomes – Stage 1 First Written Warning

- 24/ Following a **Stage 1 Capability Hearing**, if the panel decide that an employee's performance is unsatisfactory, they will usually be given a **First Written Warning** which will remain active for no longer than **12 months** at which point it will be disregarded for the purposes of the Capability Hearing. This will set out:
 - The areas in which the required performance standards have not been met
 - Targets for improvement
 - Any measures which will be taken with a view to improving performance
 - A period for review
 - The consequences of failing to improve within the review period, or of further unsatisfactory performance
- 25/ The employee's performance will be monitored during the review period. If performance levels are improved to the required standard, no further action will be taken. If however progress is not to the required level or there is further evidence of poor performance while the first written warning is still active, the matter may be progressed to a Stage 2 Capability Hearing or at the Group's discretion the review period may be extended.

Hearing Outcomes – Stage 2 Final Written Warning

- 26/ The employee will receive written notification as set out in paragraphs 16 to 18.
- 27/ Following a **Stage 2 Capability Hearing**, if the panel decide that the employee's performance is unsatisfactory, they will usually be given a **Final Written Warning** which will remain active for no longer than **12 months** at which point it will be disregarded for the purposes of the Capability Hearing. This will set out the same information as contained in a first written warning.
- 28/ The employee's performance will be monitored during the review period. If performance levels are improved to the required standard, no further action will be taken. If however progress is not to the required level the matter may be progressed to a **Stage 3 Capability Hearing**, or at the Group's discretion the review period may be extended.

Capability Procedure 4 of 9
Version 3: September 2018
Review: 2020



Hearing Outcomes – Stage 3 Dismissal

- 29/ The employee will receive written notification as set out in paragraphs 16 to 18.
- 30/ A **Stage 3 Capability Hearing** may be held if there is reason to believe that:
 - an employee's performance has not improved sufficiently and/or remains unsatisfactory following a Stage 2 Capability Hearing; or
 - their performance has been grossly negligent such as to warrant dismissal without the need for a first or final written warning.
- 31/ Following the hearing, if the panel find the employee's performance is unsatisfactory, it may consider a range of options including: dismissal; extending an active warning; or issuing a first or final written warning where one is not already in place.
- 32/ Dismissal will normally be with full notice or payment in lieu of notice, unless performance has been so negligent as to amount to gross misconduct, in which case the employee may be dismissed immediately without notice or any pay in lieu.
- 33/ As an alternative to dismissal the Group may consider redeploying an employee to a lower grade job subject to a suitable vacancy being available. If this is the case the employee's salary will be adjusted accordingly. The employee should be allowed sufficient time, normally 10 working days, to consider the offer, and will be informed that a refusal will normally result in termination of employment. The employee should be asked to give a written response within the specified time period.

Appeals

- 34/ There is no right of appeal at the informal stage.
- 35/ An employee may appeal against the outcome of stages 1, 2 and 3 and the following procedure applies:
 - A letter detailing the reason for appeal together with any relevant supporting papers should be submitted to the HR Manager within 5 working days of receipt of the written confirmation of the outcome.
 - The appeal will normally be held within 10 working days of receipt of the paperwork. The employee has the right to be accompanied at the appeal by a colleague or Trade Union Representative.
 - In cases where a warning has been issued the HR Manager will ask another Departmental Manager to chair the appeal hearing. In cases where an appeal is against a dismissal, the appeal will be heard by the Group Chief Executive unless he or she made the

Capability Procedure 5 of 9
Version 3: September 2018
Review: 2020

From: Pete Cleary
To: Kate Houston; Joanne Thomas
Subject: RE: Favour re: College
Date: 12 May 2020 14:30:47
Sensitivity: Confidential

Hi both

Personal Statement restructure Facilities Management at Ateb

- How did you identify gaps?

On arrival in my new role it quickly became apparent that there were significant gaps in the services we (ATEB) delivered and that what is required by law.

- Was it based on managerial judgement, personal judgement, observation, and discussion?

These gaps were identified using my own personal knowledge, experience and understanding of the H&SAW and other regulations, which I have gained over the many years especially in the areas of Estates/Facilities Management. The areas I identified strictly were not a part of my remit. However, under H&S regulations I had a duty to inform others of the risk identified.

- Did you have to research the external environment detailing what other housing associations do and have?

It was irrelevant what other HAs are doing in the eyes of the law. The gaps I found created a significant risk not only to the reputation of the company but to tenants. Some breached H&S law and did not follow accepted codes of practice.

- Was it based on working back from costs therefore you were set a budget and affordability and you built the people and skills to the budget?

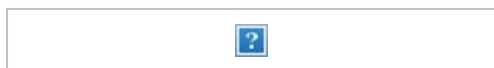
My report highlighted the gaps and concerns and proposed a small restructure which would ensure we became fully compliant with the law. It recommended new roles that would contribute to this. I did not include costings at this stage which may have been added for board by others. In a normal business case this would have been included but I was informed not to include it. (The law would expect us to comply regardless of costs)

I rewrote the role profiles for myself facilities officers and admin role, which was sent off site for grading.

There was no set process in Ateb. I wrote the business case using templates from previous experience

Hope that helps sorry its not too detailed. We have just discovered another large area of non-compliance which will create lots of work.

Pete Cleary
Estates Coordinator



Tel | [01437 763688](tel:01437763688)

From: Matthew Owens
To: Joanne Thomas
Cc: Kate Houston
Subject: Re: Recruitment
Date: 02 April 2020 14:15:34

Hi Jo,

Regarding the Site Inspector recruitment, we have been re-doing our business plan over the last few days and I have decided to suspend the recruitment indefinitely until we have a clearer picture of what the housing market is going to do. I have been following information and at the moment there is uncertainty with the housing market due to Covid. Please can you contact the candidates to let them know.

cc Kate for info.

Regards

Matt

Get [Outlook for iOS](#)

From: Joanne Thomas <Joanne.Thomas@atebgroup.co.uk>
Sent: Thursday, April 2, 2020 1:07:58 PM
To: Matthew Owens <matthew.owens@millbayhomes.co.uk>
Subject: Recruitment

Hi Matt

Hope you're well and staying safe.

Please can you provide an update regarding the Site Inspector & Construction Advisor recruitment which is on hold.

Many thanks

Jo
People Advisor



Mill Bay Homes Response to Coronavirus Crisis

Background

Mill Bay Homes 20/21 annual business plan was reviewed/approved in principal by its board in February 20. Following the onset of the Coronavirus pandemic a new business plan was prepared to account for the likely operating conditions as a result of the Coronavirus crisis and approved by the board in April 20.

The disruption associated with Covid-19 is having a profound impact on the property markets and it's too early for any of the main industry commenters to accurately predict the impact. Currently the consensus does seem suggest a short term shock next 3 - 6 months with a bounce back starting in 6 -12 months time.

I've summarised some of the key observations below:

1. Restrictions on people's ability to go about their day-to-day business will impede normal estate agency, mortgage and conveyancing processes.
2. A dramatic reduction in sale transactions over the next 3 months (Government advice to house buyers is currently not to complete on sales unless essential to do so). In 3 - 6 months transaction levels will start to rise slowly but still greatly reduced. Within 12 months transaction levels could potentially return to 60% - 80% of previous year on year levels.
3. Houses prices are expected to fall somewhere between 3% to 15%.
4. Unemployment is likely to rise in the short term, returning to pre-pandemic levels by Q3 2021.
5. Stock market falls will make people feel less secure about their personal financial and employment situation, leading to general uncertainty which will weigh on consumer sentiment.
6. Construction Industry may experience materials availability and supply chain issues when development sites start to return to full operational capacity, potentially leading to delays/construction cost rises in the short term.
7. Brexit uncertainty will also come into play later in the year.

Current Position

We have approached the planning of this difficult year as follows

Period	Quarters	Planning approach
1	Apr to Jun	lockdown - restrictions, with very little development progress, limited or no sales completions/reservations in this period
2	Jul to Sep	Derestriction - Reduction of lockdown measures but still impacting on our ability to operate normally, sales uncertain.
3	Oct to Mar	Recovery - operations on the development and sales side of the business to function but with the uncertainties of a recessionary operating environment.

Sales enquires dropped dramatically in the lockdown period and contractors suspended construction on a number of sites. As a result in our business planning all recruitment was suspended on the development and sales side of the business.

We had shortlisted for a role just as the Coronavirus situation escalated in the UK and applicants were advised that we have decided to wait to see how the market reacts before recruiting.

A weekend Sales Negotiator position had been offered prior to the lockdown period but in response to the situation we have delayed confirming a start date until we have a clearer idea of when we will be able to open our St Davids show home.

We had intended to recruit an addition Customers Service and Sales Advisor later on in the year but this was removed from the revised Business Plan and will be reviewed when we get back to a more normal level of operation.

The option to furlough employees was considered but not implemented and as we start to become more operational as restrictions start to lift it's unlikely that this is an option that will have to be used.

Matthew Owens
Operations Manager
Mill Bay Homes

From: Jane Nutland
To: Joanne Thomas; Kate Houston
Subject: Recruitment
Date: 13 May 2020 14:12:21

Hi Jo and Kate,

Please see witness testimony below. Happy to help, let me know if you need anything else.

"In my role I conduct recruitment and resourcing in different ways depending on various factors across the teams. Since starting my role three years ago I looked at how the Customer Services Advisor (CSA) team were set up and how the team resourced different Service Areas. I worked with the team to ensure we were dedicating enough time and effort to each Service Area to maintain excellent customer service. We have restructured the team a few times over the last few years and we continue to make small changes to get the balance as effective as possible.

We have separated some of the team to focus solely on certain Service Areas where we had particular pressure points such as Compliance and Lettings. Whilst I have a whole team still skilled and experienced in these areas we now have one CSA that dedicates their full time role to it. I still use the rest of the team to support these area's often where we have particularly busy periods or project work and so that skills are continuously maintained.

We have members that will sometimes be seconded for a fixed term period to work on these service areas to complete projects. I will identify the most appropriate members to complete this work by looking at the experience and skill set of the team. We have a team where some are very good at compliance work because they are very organised and have attention to detail, yet some members are better at the lettings tasks because they are very methodical. However I work out who will be best for what tasks, always bearing in mind how I am leaving the team when removing members. I can be flexible due to having lots of the team with a similar skill set, and where we have some newer members with less experience in the more in depth detail of the service areas, I can allow them to continue working on the frontline dealing with first point of contact enquiries until they are ready to expand their knowledge. I use the Achieve Framework with my team for target setting, wellbeing check-ins and also to understand future aspirations. I will bear their aspirations in mind so when there are opportunities to move my team around, I will consider if the opportunity will support the future aspirations of my team members.

I will sometimes plan demand working backwards against our salary budget. Where I can see we have money spare in the budget I will often look to increase hours among our part-time staff and sometimes recruit on a temporary basis, to ensure we have sufficient staffing levels.

During our current time of working from home and service changes due to the Covid-19 pandemic I have set rota's for the team to meet service demand. I have set up various call groups to allow the team a healthy work life balance ensuring our service to our customers and colleagues remain absolute priority. I have moved some members of the team for time periods to support other teams where service demand has been particularly high and I am currently in the middle of planning redeploying members to work with our Money Solutions Team for set periods throughout the week. This will allow us to ramp up the service in this area to our customers where it's needed most and use new innovative ways to get the job done in what is currently a pretty unstable environment."

Kind regards,

Jane Nutland
Customer Services Coordinator

From: Joanne Thomas <Joanne.Thomas@atebgroup.co.uk>
Sent: 07 May 2020 09:47
To: Jane Nutland <Jane.Nutland@atebgroup.co.uk>
Subject: Recruitment
Importance: High

Hi Jane

Hope you're well.

If you have time, please would you be able to write a witness testimony for Kate and I describing how you plan recruitment in your department. This is for our CIPD studies to support a portfolio about talent planning at Ateb.

I hope this is ok and you have time.

Let me know if you have any queries.

Many thanks

Jo
People Advisor

From: Tom Waters
To: Joanne Thomas; Kate Houston
Subject: Request for statement on the implementation of the Welfare Team
Date: 26 May 2020 10:59:29

Hi Jo, Kate.

Please find below my statement regarding the implementation of the Welfare Team. Again, many thanks for your support of this. If you think I have missed anything out please let me know.

I have been asked to explain the process's behind the implementation of our new Welfare Team.

In March 2020, I was asked to establish a new welfare service that would address the needs of our vulnerable customers in light of the Covid-19 crisis. At this point we only had one aim, to help our customers deal with the crisis, addressing their needs, which we think will be x y z. (We only had a rough idea of what their needs will be at this point).

I was assigned two colleagues to support the service but quickly realized that we would need further support, if we were to provide a service to 6000 customers, 3000 homes.

I approached our People Team (HR) and they agreed to help me identify staff that could help support the Welfare Project.

We looked at staff across the entire organisation as asked ourselves 5 key questions;

- Will this person have spare capacity in their **current role** if the country is shut down and our business operations change like in other countries?
- Does this person have the **customer service skills** required?
- Does this person have the **personal skills** (empathy, sensitive, good listener) to carry out this service?
- Does this person have any **previous experience or knowledge/ skills** around customer support?
- Is this person **adaptable and flexible**, can this person hit the ground running?

From this exercise we created a small shortlist of employees that would be able to join the team and as a result, redeployed two members of staff.

Firstly, we redeployed a Customer Services Advisor with an excellent record of providing exemplary customer service.

Secondly, Jo and Kate (People Team), along with myself identified that I was going to need lots of ongoing workforce knowledge. I needed to recruit lots of volunteers within the workforce throughout the project and would need to know things such as geographical information, medical issues related to Covid-19 and availability ongoing. We redeployed a member of the People Team who was due to transfer to another department, but due to

Covid-19 restrictions was unable to complete the required training and would therefore be more value to my Welfare Team.

Once the Welfare Team was in place, it was also apparent that there were gaps in our services. I discussed these issues with the People Team and due to budgets, decided the best course of action would be to apply for external funding and to recruit an extra member of the team. We informally reviewed the basic skills of the team and concluded that one member of the team had all the skills required to full fill the new role, some of the requirements, being specialist. We also looked at time frames and the urgency around the new position and the needs of our customers and concluded that if we were to go through the full recruitment process, once the funding was approved (if we get the funding) then our customer's well being could be neglected due to the time it would take. As a result we sought legal advice and decided that in this circumstance, we could recruit the member of the existing team to fulfill this new position. It would be much easier and less time critical to find a replacement for that person's original role, rather than the newly created role.

The Welfare Team project has been an essential and demanding piece of work and I am very grateful to the People Team for their support and planning assistance.

Many thanks

Tom.

Extract of e-Learning matrix

Hours to complete		1	1	1	1	1	1	24	8	1	1	1	1	1	1	1	1	1	1	1	Total hours
Platform		ihasco	TNTA	ihasco	ihasco	ihasco	ihasco	HSQE	HSQE	TNTA	ihasco	ihasco	ihasco	ihasco	ihasco	ihasco	ihasco	TNTA	NHS	Drafit	
RP Name	Name																				
Board								24	8	1								1		1	0
Development Officer		1 Complete		1	1			24	8	Complete			1	1		1	1	Complete	1	1	41
Development Officer		1 Complete		1	1			24	8	Complete			1	1		1	1	Complete	1	Complete	40
Development Officer		1 Complete	Complete		1			24	8	Complete			1	1		1	1	Complete	Complete	Complete	38
Customer Services Coordinator		1 Complete		1			1	24	8	1						1	1	Complete	1	Complete	39
Senior Scheme Manager		1 Complete		1		1	1	24	8	Complete						Complete	1	Complete	1	Complete	38
Maintenance Supervisor (Voids/Repairs)		1	1	1	1			24	8	1	1	1	1	1	1	1	1	1	1	Complete	46
Senior Technical Manager		1 Complete		1				24	8	Complete	1	1	1	1	1		1	1	Complete	1	41
Land and Construction Manager		1	1	1				24	8	1	1					1	1	1	1	Complete	41
Finance Office (Payments and Collections)		1	1	1				24	8	1						1	1	Complete	1	Complete	39
Estate Coordinator		Complete	Complete	Complete				24	8	Complete		Complete	Complete			Complete	Complete	Complete	1	Complete	33
Maintenance and Compliance Coordinator		1 Complete		1				24	8	1						1	1	Complete	1	Complete	38
Business Development Coordinator		1	1	1					8							1	1	1	1	1	16
Heating and Plumbing Team Leader		Complete		1 Complete	Complete			24	8	1	1	Complete	Complete	Complete		Complete	1	1	1	Complete	38
Maintenance Team Leader		1	1	1	1			24	8	1	1	1	1	1	1	1	1	1	1	Complete	46
Maintenance Team Leader		Complete	Complete	Complete	Complete			24	8	Complete	1	Complete	Complete	Complete	1	Complete	Complete	Complete	Complete	Complete	34
Accountant - Management Accounting		1 Complete		1					8							1	1	Complete	1	Complete	13
Accountant - Financial Accounting		1 Complete		1					8							1	1	Complete	1	Complete	13
Engage Coordinator		Complete		1	1			24	8	Complete						1	Complete	1	1	Complete	37
Governance Coordinator		1 Complete		1				24	8	1						1	1	Complete	1	Complete	38
Governance Assistance		1	1	1			1	24	8							1	1	1	1	Complete	40
Cleaner		1	1	1					8	1	1	1	1	1	1		1	1	1	1	21

From: Joanne Thomas
To: Poppy Kucyj
Subject: e-Learning
Date: 19 May 2020 16:32:00
Attachments: Access Instructions.pdf
 How to access DV e-learning.pdf
Importance: High

Hello,

As you may be aware, you have a series of essential e-learning to complete which I have listed below – this is mandatory training to complete before the **end of June** as we are not compliant in these areas. Your manager should have spoken to you about this already. Please complete the training highlighted in red first as this is your priority training. Completed training is highlighted in green and remaining training to complete is highlighted in yellow. The maximum number of hours to complete each module is highlighted in the training cell on the matrix below.

The original plan was to roll out much of this training as in-house 'classroom based' courses however, due to the current circumstances where we are homeworking, we are now delivering this training as e-learning modules. In future, we will likely revert back to in-house training for some courses.

Please manage your time to ensure the training is completed by the end of June. You can do this gradually; for example, if you have 44 hours to complete by the end of June, you will need to set aside approx. 7 hours per week, or if you have 12 hours to complete, you will need to set aside approx. 2 hours per week. Your line manager and Kate and I will be checking on your progress over the next few weeks to see how you're getting on and to offer any help if needed.

There are a few different platforms to access the modules; I have attached access instructions to this email. If you have any queries please let me or Kate know.

Manual Handling - 3 years	DSE Awareness - 3 years	Fire Safety (to include The use of Portable hand held Fire Extinguishers) - every 3 years	Food Safety & Hygiene	IOSH Working Safely - Every 3 years	Safeguarding Adults - Every 3 years	Safeguarding Children - Every 3 years	Equality/Unconscious Bias 0 Every 2 years	Domestic Violence - Every 2 years	GDPR - annually
1	1	1	1	8	1	1	1	1	Complete

Many thanks

Jo
 People Advisor

How do we agree the pay for our teams?



ateb want to be able to attract and retain the right skills and expertise to deliver the best services we can, so we have adopted the following process to setting the remuneration of our team.

Every 3 years we appoint an independent Human Resource consultancy to review all our role profiles across the group and compare them to other similar roles in other organisations. Our role profiles are categorised as follows:

- RP/01 - Board member (Remunerated)
- RP/02 - Chief Executive
- RP/03 - Director
- RP/04 - Manager
- RP/05 - Service or Team leader
- RP/06 - Delivery leads

The independent consultant analyses similar companies and makes allowances for our location and local employment market etc. before arriving at a salary range for each role. The consultant will consider scale, complexity and performance of ateb in concluding its recommendations.

The report is then presented to a specialist Committee of the Board called the People & Remuneration Committee by the Chief Executive and independent consultant. The People & Remuneration Committee privately review the report with the independent consultant, without any employees, to agree that the report is acceptable for ateb to use to set its salaries and/or propose changes or further work. The Committee then reports back to the main Board on their findings and the Board makes the following decisions:

- That the report provides an acceptable basis upon which ateb can benchmark its salaries
- The position within the salary ranges where ateb should benchmark its salaries e.g. lower quartile, median, upper quartile etc.

The above process makes sure that the salaries for each role are correctly pitched in the market every third year to assure we attract and retain great skills.

As costs traditionally rise annually, the People & Remuneration Committee also uses an independent consultant to consider cost of living increases from financial year to financial year. If a pay review is agreed, all the team receive the same percentage increase to their salary. Again the People & Remuneration Committee would report back to the Board for a decision on any increases deemed appropriate. The Board are not required to increase salaries if they believe the market conditions or business affordability do not warrant an increase. The Board's latest decisions regarding group salaries are as follows:

- The last Independent consultant review of ateb's role profiles was undertaken by www.foresthr.co.uk in the financial year 17/18. The next market testing report will take place in FY 20/21 and we will be working with the teams on this.



- The Board set its salaries at the median point of the 17/18 independent report
- The Board noted that the report had been tested for equal pay differentials and that as ateb has less than 250 employees, a gender pay gap return was not required
- The pay review for FY 18/19 to FY 19/20 was 2.25%

In addition to salaries the Group has a range of other incentives and benefits for example, paid holiday leave, car allowances (certain roles) and contributory pensions. ateb's pension scheme is operated by SHPS and is a Defined Contribution scheme for new starters. ateb will match team members contributions up to a maximum of 10% of their salary. Pension contributions and general pension arrangements are all agreed annually by the Board.

A new Performance Incentive Payment scheme where the ateb and WWCR Boards have the option of making a one off annual non-consolidated performance payment, subject to eligibility criteria, was introduced for FY 2019/20. The payment where made will be at the same level for all regardless of grades. MBH have a separate sales related incentive scheme. The Chief Executive role was removed from the Incentive scheme as of FY 2017/18.

The highest paid (FTE) position in the group is the Group Chief Executive, the (FTE) ratio between this and the lowest paid roles is:

- 4:1 using highest divided by the average of remaining salary method
- 6.4:1 using highest divided by lowest method

In FY 2019/20, ateb paid all its employees a minimum of £9.30p/hr which is above the National Living Wage (2019/20 NLW was £8.21p/hr for a person over the age of 25) and equal to the UK Living Wage for that year. Our apprentices are paid in accordance with the national apprentice rates with all apprentices regardless of age, starting on a minimum of £6.15p/hr per hour (FY 19/20) and then in accordance with the national age bands.

Expenses are paid were applicable in accordance with Inland Revenue advice.

Our Boards are remunerated to reflect their levels of input and responsibilities. Board remuneration applies to ateb and MBH Boards only and have been independently reviewed and evaluated.

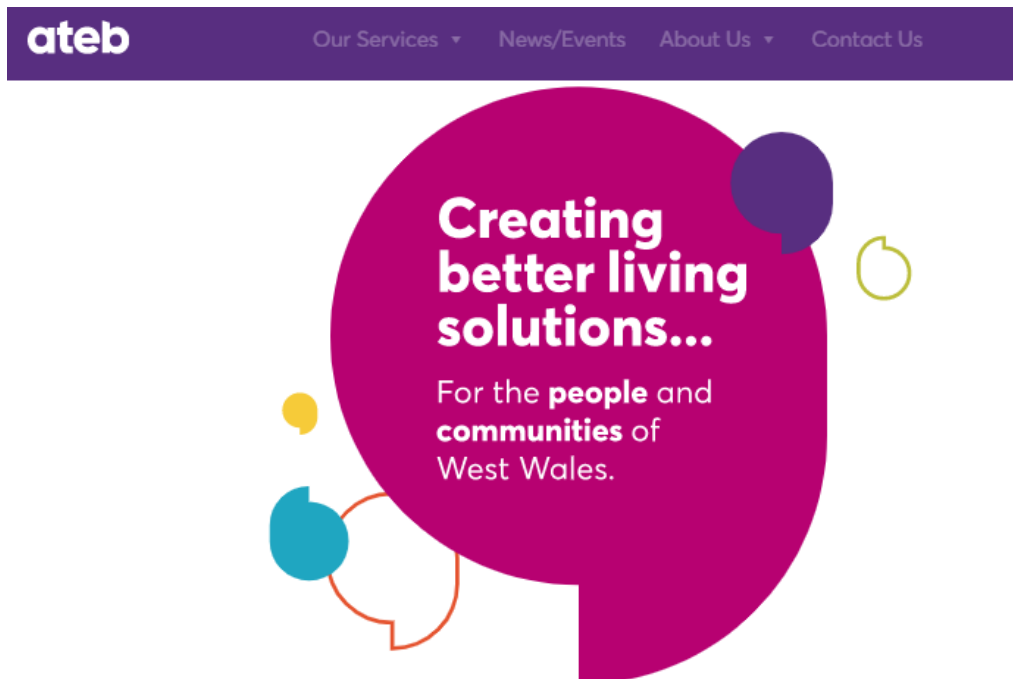
ateb aims to attract and retain the best people so will continue to develop its approaches to remuneration to ensure it meets this aim whilst being cost effective for the customers it serves.

Information current as at January 2020 - primarily reflecting on approach taken to rewards in FY 2019/20

(This report will be updated in FY 20/21)

A full Remuneration review is due to place in FY 2020/21

Extracts from Ateb's corporate website and social media platforms demonstrating employer brand



Our Purpose – We believe that better living starts with a place that we can call home.

A home is more than just a house; it's a safe, stable, secure environment from which people can live their lives. Not everyone can achieve this without help, we will create a variety of solutions to help and support people and communities to make more homes. Our Purpose:

This means that we must find creative ways of:

- Responding to housing need.
- Helping people to maintain their tenancy.
- Support communities to build capacity and be self-sufficient.
- Regenerate communities through social, economic, environmental and physical programmes.
- Help older and vulnerable people to stay in their homes and communities where their lifestyles change.

Our DNA



The ateb team have developed our DNA and leadership style statements to reflect how it should feel to work with or work for ateb.

[Our DNA](#) focuses on trust, togetherness and empowerment.

#InYouWeTrust

Trust is the essential building block to our organisation, without it, things just won't be as good. We will be open in our approach so that we can learn from each other's experiences and we will care about what we do and how we do it.

#AccessAllAreas

We will be inclusive in everything we do as diversity of background, experiences, skills and views enrich our work and services. We know we will need help, so we will seek out and sustain strong collaborative arrangements with our partners and stakeholders.

#GetThingsDone

We will take ownership of our customer outcomes and be accountable for our actions. We will have a proactive attitude and always seek to innovative and improve what we do. Things change, so we must always be flexible to adapt to situations and make sure that we are always delivering the right outcomes, efficiently with great customer experience

Why Us?

Why us? Have fun making a difference...

Be part of a team that is aiming high. We are developing a team environment to constantly seek to do more for the customers we serve through flexible and agile ways of working. Our ateb DNA reflects how it should feel to work at ateb, we hope that our approach is what you are looking for. Why us? :

The ateb DNA focuses on trust, togetherness and empowerment.

Help us to shape and live our DNA ...

- **#InYouWeTrust**
- **#AccessAllAreas**
- **#GetThingsDone**

Our DNA has been developed to allow us to do and be the best we can for the customers we serve. Our organisational culture will encourage you to take decisions, own and improve the services you deliver and recognises that we all have a part to play in building a style of leadership that focuses on people and outcomes. Find out more about [our DNA](#) and leadership style.

AIMING HIGH

Help us to achieve more ...

Our purpose and strategic plan showcase our ambition not to stand still. We want to give more to our customers through challenge and innovation of our services. Have a look at our strategic priorities to see what we are focusing on and how we are doing. Click for more on our [strategic plan](#).

Documents

As ateb moves forward we will be updating this page with documents relating to the group and how we work to create better living solutions.

Key Corporate Resources

The following document shows 'what good looks like' for ateb...

- [Vision](#) – ateb Vision Document

The Vision is supported by the following, more detailed explanations of what we need to do to improve ...

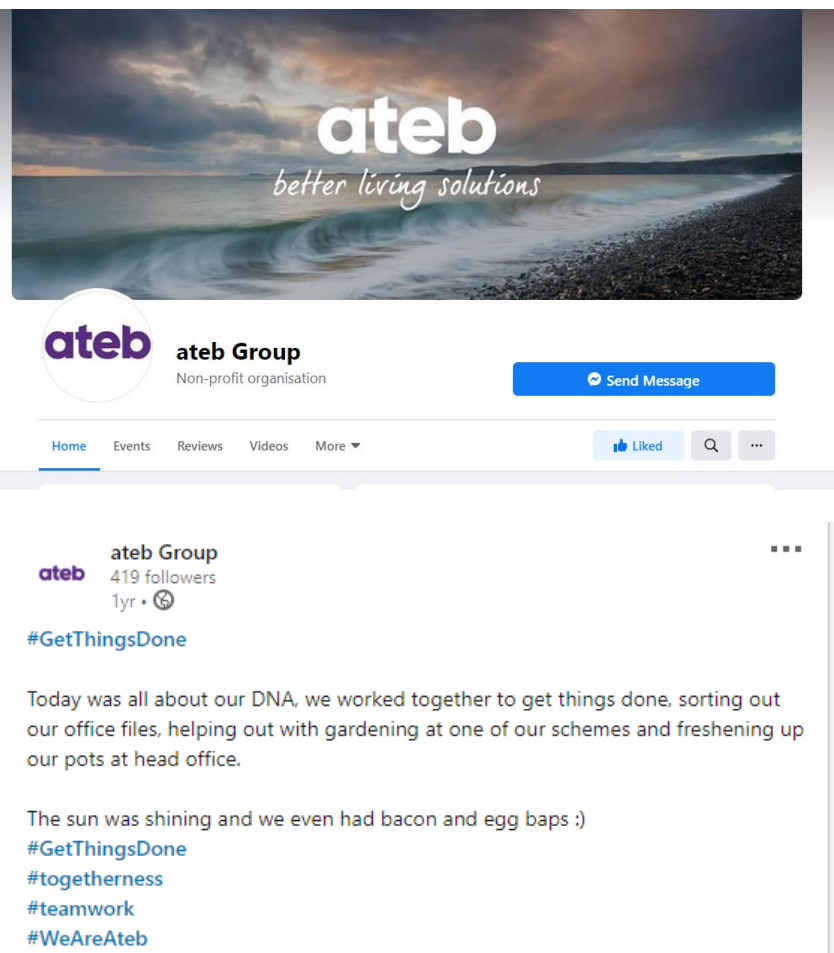
- [#1 Expect](#) – It all starts and ends with our Customer Commitment
- [#2 DNA](#) – Without the right Culture and Leadership, we will not achieve our Vision
- [#3 Plan](#) – We must plan to succeed, our 3-year Strategic Plan 18/19 to 20/21
- [#4 Deliver](#) – Our approach to providing the best services we can
- [#5 Assure](#) – How we will provide assurance that we are delivering our Vision

Self-Evaluation and Annual Review

We undertake an annual assessment of our groups performance to highlight areas of success and areas for improvement. Please see our latest reports:

18/19 – [ateb Stories 2](#)

17/18 – [ateb Stories 1](#)



ateb Group
27 March · 🌐

We will continue to put our customers at the heart of everything we do... #weareateb

ateb better living solutions

You and 2 others · 4 shares

Like Comment Share

Write a comment...

ateb Group
419 followers
1mo · Edited · 🌐

Seems as it's Thursday, we've decided to do a #throwbackthursday.

Remember Adam from our ICT department? We are thanking our ICT department for the hard work they've put in enabling us to #workfromhome whilst still being able to provide our usual, full service to our customers in these uncertain times. #weareateb

Read more below here...

<https://lnkd.in/gcKvBQq>

ateb Group
419 followers
3mo · 🌐

It's #NationalApprenticeshipWeek this week. See how we at ateb are celebrating success whilst creating better living solutions. Meet Adam and read his story here... #WeAreAteb ...see more

What did you do during your apprenticeship at ateb?
During my apprenticeship I was introduced to all aspects of IT from hardware repair to image creation & deployment. Ateb allowed me to #AccessAllAreas... Being an apprentice also taught me how to make a banging cup of tea.

How did your apprenticeship support your future career goals?
My apprenticeship has allowed me to gain valuable experience and a BNC qualification in Computing, both of which are useful in any area of the IT industry. It was satisfying to learn something in College and then put it into practice in day to day working at ateb. Aside from IT-related knowledge, I have also learned the importance of team working and communication and how we really have to trust each other to reach our one common goal!

What's a standard day in the life of Adam like?
It's hard to say really! Every day is a school day - There's always problems that require solutions. If turning something off and on again doesn't work it's satisfying to find solutions that really make me think.

How do you feel you have created better living solutions?
By providing IT support to the wider ateb team, it allows them to #GetThingsDone and help create better living solutions for the people & communities of West Wales.

Web Link
atebgroup.co.uk

ateb Group
16 March · 🌐

Closing date: 9am tomorrow!

New vacancy - Site Inspector & Construction Advisor (within Mill Bay Homes).
c£29k per annum, 37 hours per week.

To find out more about this exciting opportunity and to apply, please visit our website at https://www.atebgroup.co.uk/vacancies/1505/site_inspector_construction_advisor/meyler_house_haverfordwest/

Interview date: 23rd March 2020

#WeAreAteb
#Recruitment
#NewVacancy

ateb careers

Like Comment Share

ateb Group
7 February · 🌐

It's #NationalApprenticeshipWeek this week. See how we at ateb are celebrating success whilst creating better living solutions. Meet Sean and read his story here... #WeAreAteb
<https://www.atebgroup.co.uk/wp-content/uploads/2020/02/Sean.png>

You've had a change of a career from retail to a Maintenance apprenticeship. What was your change of heart?
It's something I've always wanted to do. I knew a change was needed and I always have wanted to work with tools. Going older if you don't go with these opportunities then you never will. I wish I had done this 15 years ago.

Why did you choose ateb for an apprenticeship?
The stars aligned, ateb were looking when I was looking. People mentioned to me how great ateb were to work for. I identified and related to the DNA and what the company was looking for. I fitted that and the role profile.

What are you hoping to achieve by the end of your apprenticeship?
A trade (carpentry and multi-trade). I would like to stay in full time employment & have seen experience from experience that other colleagues have stayed on after their apprenticeship.

How do you feel you create better living solutions?
I've always had a belief that everyone should have a safe and pleasant home environment. I feel in this role you get to provide that opportunity to people.

ATEBGROUP.CO.UK
www.atebgroup.co.uk

You, Bill Fakes, Linda Manson and 2 others · 1 share

Like Comment Share

Write a comment...

Extract from Service Hub demonstrating turnover records

18/19 VOLUNTARY TURNOVER							
Total							
Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.86%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 3.54%	
No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 1	No of leavers 0	No of leavers 0	No of leavers 4	
Start FTE 115.06	Start FTE 115.67	Start FTE 115.67	Start FTE 116.48	Start FTE 116.81	Start FTE 116.81	Start FTE 113	
Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 3.25%	
No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 3	
Start FTE 94.17	Start FTE 95.17	Start FTE 95.17	Start FTE 95.98	Start FTE 95.82	Start FTE 95.82	Start FTE 92.42	
MBH							
Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	
No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	
Start FTE 5.43	Start FTE 5.43	Start FTE 5.43	Start FTE 5.43	Start FTE 5.92	Start FTE 5.92	Start FTE 6.24	
W/C&R							
Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 0.00%	Voluntary Turnover 6.97%	
No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 1	
Start FTE 15.46	Start FTE 15.07	Start FTE 15.07	Start FTE 15.07	Start FTE 15.07	Start FTE 15.07	Start FTE 14.34	
TURNOVER							
Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.88%	
No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 1	
Start FTE 115.06	Start FTE 115.67	Start FTE 115.67	Start FTE 116.48	Start FTE 116.81	Start FTE 116.81	Start FTE 113	
Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	Turnover 0.00%	
No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	No of leavers 0	
Start FTE 94.17	Start FTE 95.17	Start FTE 95.17	Start FTE 95.98	Start FTE 95.82	Start FTE 95.82	Start FTE 92.42	

SA/15 - People Management

Highly motivated and innovative team culture

Key Service Area Performance Measures - Outcome Efficiency Satisfaction					
Ref	Performance Measure	PTD	TTD	PFY	FFY
M1	Group Voluntary Turnover Rates (Excluding retirement) %	7.74%	9.33%	1.74%	8.37%
M2	Group Turnover Rates %	3.49%	16.12%	3.49%	12.55%

1. Why are you leaving the ateb group?

- | | |
|--|---|
| ☐ Relocation | ☐ Ill Health |
| ☐ Promotion/Career Progression | ☐ Caring Responsibilities |
| ☐ Retirement | ☐ Relationships with colleagues |
| ☐ Career Change | ☐ Relationships with managers |
| ☐ Increased Pay/Benefits | |

Other (please specify)

2. Did you understand how your role helped to create better living solutions?

- ☐ Fully understood
- ☐ Partially understood
- ☐ Did not understand at all

3. How effectively did you feel your skills were put to use here?

- | | |
|---|--|
| ☐ Extremely effectively | ☐ Not so effectively |
| ☐ Very effectively | ☐ Not at all effectively |
| ☐ Somewhat effectively | |

4. How helpful was your role here in stimulating your professional growth?

- | | |
|---|--|
| ☐ Extremely helpful | ☐ Not so helpful |
| ☐ Very helpful | ☐ Not at all helpful |
| ☐ Somewhat helpful | |

5. How often did you feel your contributions were recognized?

- | | |
|---|---------------------------------------|
| ☐ Always | ☐ Once in a while |
| ☐ Most of the time | ☐ Never |
| ☐ About half the time | |

6. You should have received a minimum of one Achieve session with your manager each quarter. Did you receive these?

- ☐ Yes - more than the minimum
- ☐ Yes - received the minimum
- ☐ No - less than the minimum
- ☐ No - have not received any

7. How clear were the expectations that were set for you?

- ☐ Extremely clear
- ☐ Very clear
- ☐ Somewhat clear

- ☐ Not so clear
- ☐ Not at all clear

8. How well did your supervisor treat you?

- ☐ Extremely well
- ☐ Very well
- ☐ Somewhat well

- ☐ Not so well
- ☐ Not at all well

9. Overall, how fairly were you treated?

- ☐ Extremely fairly
- ☐ Very fairly
- ☐ Somewhat fairly

- ☐ Not so fairly
- ☐ Not at all fairly

10. How well did the members of your team work together?

- ☐ Extremely well
- ☐ Very well
- ☐ Somewhat well

- ☐ Not so well
- ☐ Not at all well

11. How difficult was it for you to balance your work life and personal life while working here?

- ☐ Extremely difficult
- ☐ Very difficult
- ☐ Somewhat difficult

- ☐ Not so difficult
- ☐ Not at all difficult

12. Overall, how much did you like working here?

- ☐ A great deal
- ☐ A lot
- ☐ A moderate amount

- ☐ A little
- ☐ Not at all

13. How would you rate your experiences of ateb against its DNA #InYouWeTrust, #AccessAllAreas, #GetThingsDone ?

Experience does not match
ateb's DNA

Experience fully matched
ateb's DNA

14. How likely are you to recommend the ateb group as an employer?

- ☐ Extremely likely
- ☐ Somewhat likely
- ☐ Not at all likely (please specify)

15. What actions can ateb take to build a better workplace?

16. Do you have any other comments, questions, or concerns?

17. If you would like to discuss your answers in more detail with a member of the People & Communications Team, we can contact you to arrange a convenient time to meet/phone you. Would you like us to contact you?

- ☐ Yes
- ☐ No

Extract from Ateb's 'Vision' document detailing 12 competencies every employee must have



17/ DNA

All our people will need to demonstrate the following personal characteristics and attributes appropriate to their role and their leadership group:

Technical Competency We will make sure we have the right skills and expertise	Decision Making We need people throughout our organisation to make the right decisions at the right time	People Management We must always get the best from our people	Team Working So much more can be achieved through good team work	Financial Control To help as many people as we can we must be financially aware and astute	Communication Is the glue that will keep our organisation together
Organisational Skills Agility and flexibility can only be achieved through well organised and connected systems	Innovation To make our resources go further, we need to be thinking... What If?	Customer Service Is at the heart of what we do, we are a customer service focused organisation	Project/Process Management Improvement can only be embedded where there is effective project management	Enthusiasm We are here to make a difference, not to make up the numbers	Technology Competency In our fast moving digital world we must be technologically adept

Extract from role profile sample detailing 12 competencies tailored to the role

RP/06 | PEOPLE ADVISOR

ateb *better living solutions*

5/ Personal characteristics and attributes I will need to demonstrate

In addition to the attributes detailed or implied in my role profile, I will need to have/develop the following qualifications, skills, characteristics and/or experiences to fulfil my role:

Leadership Style	Characteristics and attributes
Technical Competency	Have a good level of competency in Human Resources with a knowledge of employment legislation. Likely to have experience of working within Human Resources with direct or easily transferable skills and expertise relevant to advice and guidance, and potentially have qualifications to support the key service areas. CIPD would be great. Must be able to demonstrate a reasonable level of literacy and numeracy, for us this usually means achieving success at GCSE/Key Skills or equivalent qualifications, but we are happy to discuss this with you.
Decision making	Will be confident to make the right decisions to ensure the best service outcomes. Making decisions involving checks and comparisons, using personal/professional judgment and knowing when to seek advice.
People management	Willing to learn from others and share own experience and knowledge. Let team members know what is expected of them
Team working	Need to create the right environment for teamwork to thrive both internally and externally. Be able to lead and participate in teams effectively
Financial control	May have responsibility for purchasing, cash or stock and should be able to review and report on budgets as and when required.
Organisational skills	Will be able to effectively set own work plan and prioritise key tasks.
Innovation	Must show a desire to improve and challenge what we do to constantly improve our service outcomes, efficiency and customer experience. Identifies, plans and implements improvements within the team which support service delivery.
Customer service	Always aim to provide a great customer experience both internally and externally. I need to be able to demonstrate the importance of customer service to my team and colleagues by putting the customer first.
Project / process management	Project manage improvements within my and others service areas to ensure the desired outcomes are achieved. Takes responsibility for achieving individual objectives and contributing to team and group projects.
Enthusiasm	Show I am a self-starter and will bring my personal drive and positive attitude to help all find solutions to problems. Will be able to: <u>promote and demonstrate our DNA at all times</u> , to improve and grow our business. How will I make a difference?
Technology Competency	Confidently use ICT systems to deliver and improve my service delivery. <u>In particular.. I will have good knowledge of the Microsoft office suite of software and HR databases, using ICT systems within work setting; keeping up to date with training courses would be great.</u>
Communication	Be able to promote good communication throughout the organisation (verbal, written, face to face), ensuring teams are involved, <u>informed</u> and engaged at all times Ability to speak Welsh would be great.

Extracts from recruitment advertising documents I prepared

Recruitment pack extract



8/ Customer Services Advisor

Is This For You?



THE ROLE

You will be part of a great team that provides excellent customer service managing a wide range of queries, offering advice and support to ateb's customers to provide better living solutions.

The role is fast paced, dynamic, varied and interesting, no two days are ever the same; good interpersonal skills are essential along with the ability to work closely across teams.

THE TEAM

The Customer Service Advisor is part of the Customer Solutions Team; they are the first point of contact for all ateb customers and colleagues.

The team is made up of five Customer Service Advisors, two Clerical Assistants, one Archiving and Electronic Filing Assistant, all managed by the Contact Centre supervisor.

The team is agile and adaptable having a good all round knowledge base, whilst being understanding and empathic with ateb customers.

The team work hand in hand with our Maintenance Team to ensure homes are maintained to an exceptional standard.

KEY DATES

Closing Date	12 noon, 23 January
Interview	5th February

Applicant letter

ateb



Dear Applicant,

Customer Services Advisor

Thank you for your interest in the role of Customer Services Advisor at ateb group limited.

It has been just over a year since the launch of our name **ateb** that means solution and answer in Welsh. Our name fits perfectly with our core purpose of "creating better living solutions for the people and communities of West Wales".

On our website you will find a lot more info on ateb including our Vision document and 3-year Strategy. We want our teams to always provide our customers with the right service outcomes, efficiently with great customer experience. To do this we are committed to developing an ateb DNA based on trust, togetherness and empowerment and a leadership style that is inclusive.

We are looking for an enthusiastic Customer Services Advisor to help us to continually deliver an excellent service to our customers. If you share our vision and have the required characteristics and personal attributes, we want to explore how you could help us to make a difference.

Hopefully the information pack provides you with sufficient background to be able you to submit your application, which we look forward to receiving **no later than 12 noon on Thursday, 23rd January 2020** but if you have any queries, please don't hesitate to contact us at recruitment@atebgroup.co.uk

Nick Hampshire
Chief Executive

Attached - Role Profile | Recruitment Pack | Advert

Meyler House, St. Thomas' Green, Haverfordwest, Pembrokeshire, SA61 1QP

Tŷ Meyler, St. Thomas' Green, Hwlfordd, Sir Benfro, SA61 1QP

☎ 01437 763688 ✉ hello@atebgroup.co.uk 🌐 atebgroup.co.uk



Mae gŵirio cyfyngedig ateb yn gyswllt hysbysu gofrestrdd gŵirio FCA, Reg. Rhif 23308R, llandfod cymdeithasol gofrestrdd gŵirio Llywodraeth Cymru, Reg. Dim POT2 ac mae'n aeddiad o Gymuned Tai Cymru. ateb group limited is a registered society with the FCA, Reg. No 23308R, a registered social landlord with the Welsh Government, Reg. No POT2 and is a member of Community Housing Cymru.

Advert



ateb needs you to

create better living solutions

ateb
better living solutions

Customer Services Advisor

15 hours per week – permanent position (Monday & Wednesday however, days are negotiable)

37 hours per week – fixed term 12 weeks

c£20k per annum (pro-rata for part time)

We have a great opportunity to join ateb within the established Customer Solutions Team. You will provide excellent customer service managing a wide range of queries, offering advice and support to ateb's customers to provide better living solutions. The role is fast paced, dynamic, varied and interesting - no two days are ever the same. Good interpersonal skills are essential along with the ability to work closely with other teams.

Check out the role details for more information.

Closing date: 12 noon, 23rd January 2020
Interview date: Wednesday, 5th February 2020

#WeAreAteb

Role profile extract (front page)

CD/05 | Role Profile

Customer Services Advisor

Emp. ref	>>>
Role profile	06/08
Joining date	>>>
Last updated	26/02/2019



ateb better living solutions

Extract of shortlisting matrix I prepared

[illegible]

Shortlisting Matrix - CSA - Closing date 23rd January 2020		
No.		Reasons for decision
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		

Extract of shortlisting matrix with scores/ reasons I completed

Shortlisting Matrix - CSA - Closing date 23rd January 2020																
0- No demonstration of skill/ experience/ qualification 1- Mentions the skill/ experience/ qualification 2- Mentions and brief example of skill/ experience/ qualification 3- In depth example and detail of skill/ experience/ qualification and relates their example back to the Job Description.																
No:	Name:	1. Technical competency	1a. Academic competency	1b. Practical competency	2. Decision making	3. People Management	4. Team working	5. Financial control	6. Organisational skills	7. Innovation	8. Customer service	9. Project/process management	10. Enthusiasm	11. Technology competency	12. Communication	Total
1		1	2	0	0	0	1	1	0	0	1	0	1	0	0	7
2		1	2	0	0	0	0	1	0	0	2	0	0	0	1	7
3		1	1	1	0	1	0	0	0	0	2	0	1	0	0	7
4		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5		1	1	1	0	0	0	0	0	0	1	0	1	0	0	5
6		0	2	0	0	0	0	0	0	0	1	0	0	0	0	3
7		0	2	0	0	0	0	0	0	0	1	0	0	0	0	3
8		0	0	0	0	0	0	1	0	0	1	0	0	0	0	2

Shortlisting Matrix - CSA - Closing date 23rd January 2020		
No.		Reasons for decision
1		Poor application, lacked any detail or evidence of skills or experience to support RP reqs.
2		Poor application, lacked any detail or evidence of skills or experience to support RP reqs. Provide an example of providing customer services, whilst is demonstrating the caring nature, it did not demonstrate the ability to provide customer advice/support.
3		Poor application, lacked any detail or evidence of skills or experience to support RP reqs.
4		Very poor application; no detail to demonstrate skills/exp. Poor demonstration of literacy skills in application due to spelling/grammer issues.
5		Poor application, lacked any detail or evidence of skills or experience to support RP reqs.
6		Poor application, lacked any detail or evidence of skills or experience to support RP reqs.
7		Poor application, lacked any detail or evidence of skills or experience to support RP reqs. Provide an example of providing customer services, whilst there is good intentions, it raises questions of professional boundaries.
8		Poor application, lacked any detail or evidence of skills or experience to support RP reqs.
9		Poor application, lacked any detail or evidence of skills or experience to support RP reqs.

Extract of interview questions I reviewed and agreed and interview matrix I prepared

5. ateb is evolving all the time, everyone can get comfortable with routines - how have you handled dealing with changes in your past workplaces?

6. Our DNA at ateb is trust, togetherness and empowerment. How will you demonstrate this in the workplace?





7. Our culture at ateb is about being open and honest. Why do you think feedback is important, whether it is good or constructive?

8. You have customer call in very distressed with a water leak, how would you deal with this situation?

Interview Matrix**Customer Services Advisor - 5th February 2020**

Question	Name:							
1	Personal profile							
2	ateb knowledge							
3	Organisation skills							
4	Team conflict							
5	Experience of change							
6	DNA							
7	Value of feedback							
8	Customer scenario							
Total								

Scoring – candidates answers should be scored as follows:

0	No answer given or answer completely irrelevant. No examples given.	2	Some points covered, not all relevant. Some examples given.	4	Good answer. Relevant information. All or most points covered. Good examples.
1	A few good points but main issues missing. No examples/irrelevant examples given	3	Some points covered. Relevant information given. Some examples given.	5	Perfect answer. All points addressed. All points relevant. Good examples.

Interview Matrix**Customer Services Advisor - 5th February 2020**

Summary of reason for appointing or not, linked to criteria:

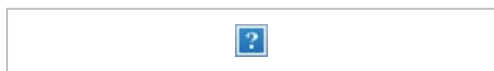
Extract of application form I prepared demonstrating questions were asked to identify conflict with housing association legislation

Due to the conditions within schedule 1 of the Housing Act 1996, ateb is unable to employ any relative or close associate of a Board Member. Are you a relative or close associate to an ateb Board Member?	Sift Question
If yes please provide details	Multi line text
Have you worked for the ateb group (including West Wales Care & Repair and Mill Bay Homes) within the last 12 months?	Sift Question
If yes please provide details	Multi line text
Are you a relative or close associate of a current employee of the ateb Group (including West Wales Care & Repair and Mill Bay Homes)?	Sift Question   
If yes please provide details	Multi line text
Are you a relative or close associate of a former employee who has worked for the ateb Group within the last 12 months (including West Wales Care & Repair and Mill Bay Homes)?	Sift Question
If yes please provide details	Multi line text

From: Evelyn Calveley
To: Joanne Thomas
Subject: Witness testimony
Date: 26 May 2020 11:16:13

I have been selected to take part of the Coffee and Chat panel for recruitment in my department. This was the first time I have been involved in any recruitment activities so Jo met with me before the interviews to explain the process. Jo explained what I should or should not say during the interview, like asking about children or medical information. Jo explained the protected characteristics, what could be classed as discrimination and not to let my personal judgement influence by decisions. Jo provided a template to complete at the interview which also included a reminder about the importance of being objective.

Evelyn Calveley
Customer Service Administration Assistant



Tel | [01437 763688](tel:01437763688)
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk



This email, and any attachment, is for the use of the addressee only. Any other distribution, use or reproduction without the sender's prior consent is unauthorised. If you receive this message in error, please notify the sender immediately and delete the message from your computer. ateb group limited is a registered society with the FCA, Reg. No 23308R, a registered social landlord with the Welsh Government, Reg. No PO72 and is a member of Community Housing Cymru.

Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhwch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

“Thinking about this role how will you work with your colleagues across the business?”

Candidate Name:

Where do you think they “fit” on the DNA scale?

0 = no evidence of matching DNA 4 = fully meets the DNA

0	1	2	3	4
---	---	---	---	---

How interested are they in the role?

0 = no evidence of interest 4 = enthusiastic and interested

0	1	2	3	4
---	---	---	---	---

How engaged with you were they?

0 = no evidence of engagement 4 = fully engaged during conversation

0	1	2	3	4
---	---	---	---	---

Overall how well do you think they will work with their colleagues across the business?

0 = no evidence of engagement 4 = fully engaged during conversation

0	1	2	3	4
---	---	---	---	---

Additional Comments:

Don't forget...

ateb Group is fully committed to the principle of equal opportunities in employment and the delivery of its housing services. We are committed to ensuring that all job applicants and members of our team are treated equally and are not discriminated against on the grounds of their protected characteristics i.e age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, and sexual orientation.

What does this mean in practice?

- Don't ask any discriminatory questions e.g. do you have any children/ are you having a family soon?
- Don't make any assumptions base on their protected characteristics.
- Make sure all your scoring is based on objective factors e.g. someone says they dislike change or cannot use Excel – that is objective. Whereas, “I've got a feeling this person isn't dependable” or stereotyping about certain groups – this is subjective.

If in doubt, speak to the People & Comms Team 😊

Extract from Applicant Tracking System messaging system, demonstrating offer for adjustments at interview

>
> On Fri, Jan 31, 2020 at 2:31 PM Joanne Thomas <joanne.thomas@atebgroup.real-job.co.uk> wrote:
>
> > Dear Mark,
> >
> > Re: Post of Customer Services Advisor (2x posts available)
> >
> > Further to your application for the above post we would like to invite you
> > to attend an interview at Meyler House, St. Thomas Green, Haverfordwest on
> > Wednesday 5th February 2020. Please visit
> > http://www.atebgroup.real-job.co.uk/interview_booking/1584/d6394b/ to
> > book your interview with us.
> >
> > You will be interviewed by David Tovey - Customer Services Manager, Jane
> > Nutland - Contact Centre Coordinator, and Joanne Thomas - People Advisor.
> > You will also have an opportunity to meet members of the Customer Services
> > wider teams. Please allow approximately 45 minutes.
> >
> > Please bring with you to your interview the following original documents:
> >
> > * Passport or Full Birth/Adoption Certificate
> > * Official document giving your National Insurance Number and name.
> > * Driving Licence
> > * All original certificates relevant to your application.
> >
> > If you have a disability, which may require us to make reasonable
> > adjustments for your interview, please let us know how we can assist you.
> >
> > Would you please contact Kate Houston on 01437 776952 if you are unable to
> > attend the interview.
> >
> > Yours sincerely
> >
> > Joanne Thomas
> > People Advisor
> >
> >
> >

Extract from privacy notice for Applicants



ateb

Notice 2: Applicants Privacy Notice

Applicants: How your information will be used

Introduction

1. The ateb Group (including Mill Bay Homes and West Wales Care & Repair) to be known as "the Group" needs to keep and process information about you for normal recruitment purposes. The information we hold and process will be used for our management and administrative use only. We will keep and use it to enable us to run the business and manage our relationship with you effectively, lawfully and appropriately, during the recruitment process. This includes using information to enable us to comply with any legal requirements, pursue the legitimate interests of the Group and protect our legal position in the event of legal proceedings. If you do not provide this data, we may be unable in some circumstances to comply with our obligations and we will tell you about the implications of that decision.
2. We are committed to protecting the privacy and security of your personal information. This privacy notice describes how we collect and use personal information about you during and after your application process with us, in accordance with the General Data Protection Regulation (EU 2016/679) ("GDPR") and the related UK legislation, including the Data Protection Act 2018 ("DPA").
3. Your data will only be processed if we have a lawful ground to do so. This includes using information to enable us to comply with our legal obligations, pursue the legitimate interests of the Company and protect our legal position in the event of legal proceedings. If you do not provide this data, we may be unable in some circumstances to comply with our obligations and we will tell you about the implications of that decision.
4. It is important that the personal information we hold about you is accurate and current. Please keep us informed if your personal information changes during the course of the recruitment process.

How your data will be processed

5. Application/data collection forms are produced by the ateb group who, as Data Controller, will collect and use your data for the purposes of considering you for suitable employment vacancies, communicating with you at various stages in the selection process (such as to arrange interviews), and for inducting successful applicants.

Joanne Thomas

Subject: Prepare advertising materials for CSA recruitment

Start: Mon 06/01/2020 13:00

End: Mon 06/01/2020 14:00

Recurrence: (none)

Organizer: Joanne Thomas

Extract from advertising platforms – corporate website not included
as this is removed after the closing date

Applicant tracking system

Expired - Customer Services Advisor (2x posts available) [CS08/01/19]

Title

Customer Services Advisor (2x posts available)

Reference

CS08/01/19

Owners

Location

Meyler House, Haverfordwest

Salary

c£20k per annum

Hours

15 hours per week (Mon & Wed) Permanent. Plus 1

Job Advert

Source

Format

B

I

ABC

Thank you for your interest in our vacancy. Please see the following supporting documents below:

1. Advert
2. Applicant Letter
3. Recruitment Pack
4. Role Profile

If you are interested in applying, please follow the link below - guidance notes and information regarding our DNA is also available via the link below.

Indeed

indeed

Dashboard

Find CVs

Analytics

Jobs

Candidates

Messages

Back to all jobs

Customer Services Advisor

ateb Group – Haverfordwest, Pembrokeshire

Clicks

Your job

Clicks this week

0

17/01/2020

18/01/2020

19/01/2020

20/01/2020

21/01/2020

22/01/2020

23/01/2020

Candidates

Awaiting Review

8

Total (excluding rejected)

144

0 Rejected

Discover your top applicants faster by sending a free assessment

Get a more complete picture of each candidate by being able to view and compare their assessment score results when you turn on the assessment of your choice.

Choose Assessment

Job Description

Please note, applications must be made via atebs website. We do not accept applications made via Indeed only. Please apply online at: <https://www.atebgroup.co.uk/about-us/working-with-us/join-us/vacancies/>

Customer Services Advisor (2x posts available)

- 15 hours per week – permanent position (Monday & Wednesday however, days are negotiable)
- 37 hours per week – fixed term 12 weeks
- c£20k per annum (pro-rata for part time)

We have a great opportunity to join atebs within the established Customer Solutions Team. You will provide excellent customer service managing a wide range of queries, offering advice and support to atebs customers to provide better living solutions. The role is fast paced, dynamic, varied and interesting - no two days are ever the same. Good interpersonal skills are essential along with the ability to work closely with other teams.

Check out our website at www.atebgroup.co.uk/about-us/working-with-us/join-us/vacancies/ for more info and to apply.

Closing date: 12 noon, 23rd January 2020

EV17.pdf

Facebook


ateb Group
 8 January · 🌐

NEW VACANCY

Customer Services Advisor (2x posts available)

- 15 hours per week – permanent position (Monday & Wednesday however, days are negotiable)
- 37 hours per week – fixed term 12 weeks
- £20k per annum (pro-rata for part time)

We have a great opportunity to join ateb within the established Customer Solutions Team. You will provide excellent customer service managing a wide range of queries, offering advice and support to ateb's customers to provide better living solutions. The role is fast paced, dynamic, varied and interesting - no two days are ever the same. Good interpersonal skills are essential along with the ability to work closely with other teams.

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Closing date: 12 noon, 23rd January 2020
 Interview date: Wednesday, 5th February 2020

#WeAreAteb




 and 2 others

6 comments 16 shares

LinkedIn


ateb Group
 419 followers
 4mo · 🌐

NEW VACANCY

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Check out our website at <https://lnkd.in/g/jxkKpH> for more info and to apply.

Closing date: 12 noon, 23rd January 2020
 Interview date: Wednesday, 5th February 2020

#WeAreAteb



 3

 Like
  Comment
  Share



Joanne Thomas – January 8 at 4:03 PM
📎 Customer Services Advisor vacancy

We are currently recruiting for 2x CSA posts:

- 1x 15 hours per week, permanent (Monday and Wednesday however, days are negotiable).
- 1x 37 hours per week, fixed terms for 12 weeks.

c£20k per annum.

Check out our website for more details and to apply.

Thanks



👍 LIKE ↩️ REPLY ➦ SHARE ✎ EDIT ⋮
[Redacted] like this

Seen by 93



Recruitment & Selection Process

1	Manager requests recruitment/team member leaves	
2	People Team to send recruitment brief, induction plan template and previous interview questions/assessments to manager	Same day as request
3	Recruitment brief is returned to and agreed with People Team	
4	People Team to book rooms and panel/coffee & chat people	Within 2 – 3 days of receiving brief
5	People Team to update recruitment pack and role profile	As above
6	People Team to send updated pack and role profile to manager for approval	As above
7	Manager signs off pack and role profile	
8	Vacancy is set up on Harbour	Within 24 hours of recruitment pack/RP being signed off
9	Vacancy is uploaded onto website	As above
10	Vacancy is uploaded onto This is Housing (where appropriate) and other media requested by manager	As above
11	Vacancy is uploaded onto Hootsuite and posted to LinkedIn/Twitter/Facebook ensuring regular posting happens	As above
12	Post closes	
13	Shortlisting matrix developed and sent to panel	Within 24 hours of post closing
14	Panel shortlist independently	
15	Panel meet to agree shortlist and shortlisting outcome form completed by panel chair	Within 24 hours of

		shortlisting panel meeting
16	Interview schedule set up on Harbour	Within 24 hours of receiving shortlist outcome form
17	Interview invites sent out via Harbour to include ID documents and certificates/evidence highlighted in RP	As above
18	Regrets sent out	As above
19	Send out DNA questionnaire to shortlist	As above
20	Finalise tests/assessments and interview questions	No later than one day before interviews
21	Pull together interview packs for panel	No later than midday before interviews
22	Obtain copies of ID/certificates on interview day	
23	Decision made and interview outcome form completed by panel chair	
24	Panel chair rings successful candidate to make verbal offer	Within 24 hours of interview
25	Candidate accepts	
26	Provisional offer issued and regrets sent out	Within 48 hours of verbal offer being accepted
27	Start checking process – OH, references, review of ID documents and certificates, Schedule 1, DBS etc	As above – subject to candidate giving approval to approach referees
28	References sent to panel when received	
29	OH fit note received	
30	Final check to ensure all checks are satisfactory and certificates match RP requirements	
31	Line manager to contact candidate and arrange start date	Within 48 hours of all satisfactory checks being received
32	Line manager to let People Team know	
33	Confirmed offer and paperwork to be issued – Equal Opps, appointment form	Within 2 – 3 days of checks being signed off

34	Set new starter up on Breathe/HR.net (or equiv), payroll	At least 1 week before start date
35	Set up electronic file for successful candidate and move all relevant recruitment documents over	As above
36	Recruitment paperwork to be stored and reminder set for People Team to destroy in 6 months time	Within 1 week of closing
37	Surveys sent out to candidates and managers	As above
38	Service hubs to be updated and finalised	Within 1 month of confirmed offer going out but before quarter end deadline set by P&CM
39	Feedback sent if requested	Within 2 weeks or request
40	Yammer Welcome message	On day of starting

Extracts of new recruitment forms which are being trialled

Shortlisting form

ateb

Shortlisting Form

Candidate	Technical Competency e.g. The degree to which the candidate has the qualifications, professional membership & certifications required for the role	Relevant Skills & Experience e.g. The degree to which the candidate has skills & experience that match the requirements of the role	Quality of Application: Part 1: Effort The degree to which the candidate has taken time and effort in completing the application/tailoring their CV	Quality of Application: Part 2: Answers The degree to which the candidate has answered the additional questions in the application form

Scoring Matrix:

0 = No evidence provided/no effort made

1 = Very little evidence provided/very little effort made to show how match the RP

2 = Some evidence/effort made/some examples given which relate back to RP

4 = Lots of evidence/effort made/ many examples given which relate back to RP

Shortlisting outcome form

ateb

Shortlisting Outcome Form

Vacancy:

Panel Members:

Candidate	Shortlisting Y/N	Reasons for Shortlisting/Not Shortlisting

Signature of Chair:

Date:

Interview outcome

Successful Candidate:
Panel Members:

ateb

Interview Outcome Form

Vacancy:

Candidate	Appointable? Y/N	Combined Panel Interview Score	Assessment Score	Coffee & Chat Feedback	Reasons for offer/regret

Recruitment request form



Recruitment Request Form

Before you start....

Have you reviewed the role profile? We always recommend doing this before you start to recruit as things can change.

Establishment Code		Post title	
Is this post currently vacant?	Y/N	If no, what date will it become vacant	
Previous post holder's name if applicable			
Is this post replacing another post/posts?			
If so, please list the establishment codes of the post/s			

Please provide us with the following information for our Recruitment Pack:

What will the candidate need to do the role? (Refer to the Technical Competency section of the Role Profile) Max of 100 words
Where does this role sit in the ateb group? (Describe who it reports to, who are their main contacts, what groups do they attend/contribute to) Max of 100 words

#1

COMPLETE

Collector: CSA - January 2020 (Web Link)
Started: Thursday, February 20, 2020 2:20:40 PM
Last Modified: Thursday, February 20, 2020 2:29:08 PM
Time Spent: 00:08:28
IP Address: 104.103.71.47

Page 1

Q1

How satisfied were you with the support received from the People & Communications Team during your recruitment activity? 5 being extremely satisfied, 1 being unsatisfied

☆ 4

Q2

How satisfied were you with the recruitment pack provided by the People & Communications Team? 5 being extremely satisfied, 1 being unsatisfied

☆ 5

Q3

Overall how satisfied were you with the recruitment service provided by the People & Communications Team? 5 being extremely satisfied, 1 being unsatisfied

☆ 4

Q4

Yes

Do you think we could make any improvements to the service we provided?

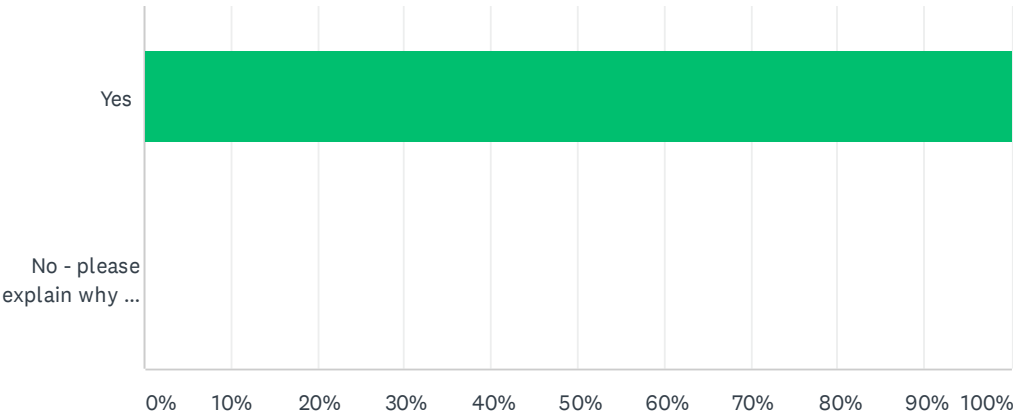
Q5

If you answered Yes to Q4 please provide us with your suggestions

As a new employee it perhaps would be useful for a run through the process just to ensure staff fully understand the mechanics behind the scoring/assessment etc.

Q1 Did our recruitment process live up to your expectations?

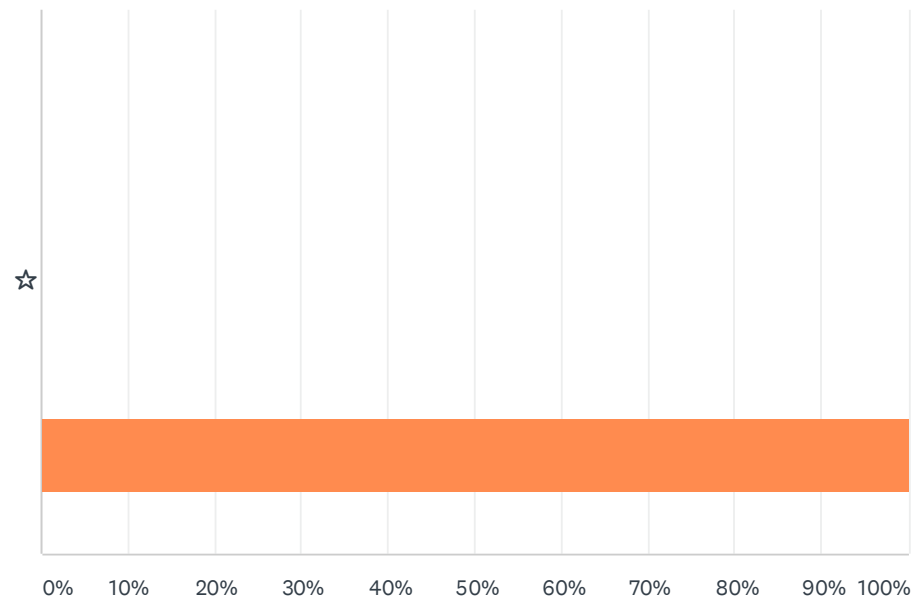
Answered: 6 Skipped: 0



ANSWER CHOICES		RESPONSES	
Yes		100.00%	6
No - please explain why and what we can do to improve our process.		0.00%	0
TOTAL			6

Q2 Please rate the advertising materials on a scale of 1-5 (1 = Poor/Not informative, 5 = Excellent/Very informative)

Answered: 6 Skipped: 0

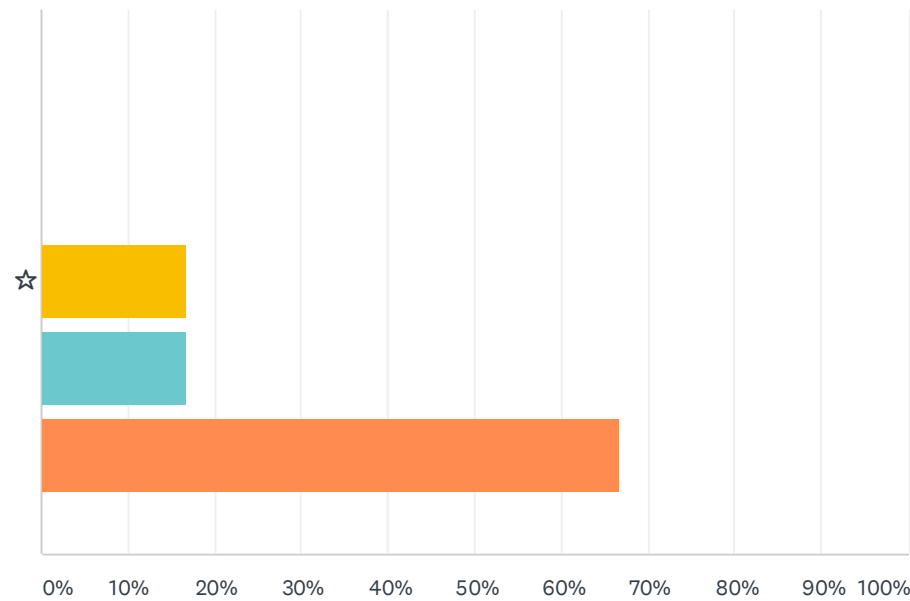


1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 6	6	5.00

Q3 Please rate how easy it was to complete your application online on a scale of 1-5 (1 = Very Difficult, 5 = Easy)

Answered: 6 Skipped: 0

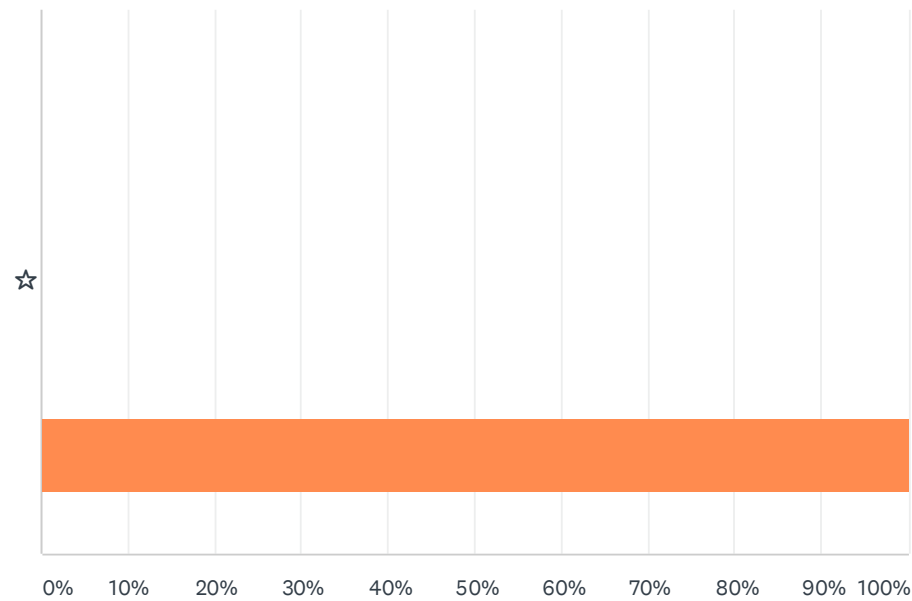


1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	16.67% 1	16.67% 1	66.67% 4	6	4.50

Q4 Please rate the communication you received from ateb during the recruitment process, on a scale of 1-5 (1 = Poor, 5 = Excellent)

Answered: 6 Skipped: 0



1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 6	6	5.00

Q5 Please provide any additional feedback in the box below.

Answered: 4 Skipped: 2

From: Jane Nutland
To: Joanne Thomas
Subject: Witness Testimony
Date: 02 June 2020 14:32:47

Hi Jo

Please find witness testimony below regarding the recent CSA recruitment you supported us with.

Jo has been the HR lead for the recruitment across my team for the last couple of years. We recently recruited for two new CSA roles in January this year where Jo supported the recruitment panel to provide advice and guidance and ensure the process is fair, consistent and structured.

She did this by mutually agreeing dates for advertising, closing, shortlist, interview and ideal appointment by date and sending calendar invites to myself and the rest of the panel. We had a new member of staff on the panel and Jo discussed the process and responsibilities of the panel and the role he would play in the recruit as well as her role. She answered any questions around recruitment we both had and has always been very approachable and flexible in this respect.

As soon as we agree to proceed with the recruitment, Jo advised on advertising platforms and we agreed to use the website, linkedin, facebook and yammer for this particular role. We agreed that we would likely get a good response from the variety of sites we had chosen.

Jo then sent me all the recruitment information, such as the recruitment pack and role profile so that I could review and ensure all was still relevant and update where necessary. Jo completed all other administrative duties such as preparing the recruitment documents, shortlisting/interview document, and candidate correspondence.

The panel shortlist separately but come together to compare and confirm successful candidates; the panel chair has the final decision. Jo provided the guidance to ensure shortlisting is objective based on the role criteria so that we could all come to a joint decision that was fair.

Jo then sent me the previous interview questions and assessment for the role for me to run through and change up to make as relevant as possible to the role and profile. Jo reviewed this to ensure it is fair, based on the role requirements and does not have scope to be deemed discriminatory such as referring to protected characteristics.

I selected junior staff who are stakeholders of the role for our 'coffee and chat' sessions. Jo arranged to meet with them to ensure they understand what they cannot ask, again removing unconscious bias, reference to protected characteristics etc, as they have not been involved in recruitment before.

Jo then prepared all materials and resources such as interview packs and meeting rooms for privacy for us to successfully run the interviews.

For the time I have jointly worked with Jo to recruit every stage is completed in a timely manner from advertising on the agreed day and providing documentation, right the way through to offering letters and collecting references. With this particular recruitment we were was delayed in

regretting the unsuccessful candidates as these were being reviewed by other managers for a different recruitment. This would not be practice Jo would usually follow as she likes to let candidates know as soon as possible but I completely understood the delay as it may benefit other departments and in turn the successful candidates.

As I've already mentioned I've always found it very easy to work with Jo but this recruitment was particularly successful as we filled both vacancies with talent reflecting the role requirements and aligning with Ateb's DNA. Jo's ideas and take on the candidates and the impact each person could have on the rest of the team really supported me to pick the perfect people.

Following the recruitment Jo provided a survey for managers to complete to feedback about their experience on the recruitment service. The survey asks how we felt the recruitment process was and what went well, but also suggestions and ideas to make changes for future recruitment.

Jo also sends a survey to the candidates following the recruitment process and reports back on the feedback. If there is ever any negative feedback we discuss together to see if there are ways of improving the service. We did have some negative comments from one of the candidates. They had said that the second stage assessment/meet the team wasn't tangible and felt it didn't allow her to showcase her skills. We took this very seriously and revised the assessment and made a more thorough marking process to ensure there is tangible results and reduce the likelihood of complaint.

Jane Nutland
Customer Services Coordinator