Qualification:

CIPD Diploma in Applied Human Resources

Module Name:

Contributing to the Management of Change

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CIPD Membership Number:	49777067

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: Kate Houston

Date: 6th February 2020

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Qualification title: Contributing to the Management of Change				Unique Learner No. (ULN): 1403228	
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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:**	**6th February 2020**

1.

About the change

Ateb have been working on Our Future Workplace (OFW) over 18 months which is a major change connected to a change of management seeing; re-branding, identifying new strategic aims, changing its culture and in return re-looking at current structures and systems whilst preparing for future technological transformation. CIPD (2018), reflect that unless there are direct linkages between the above, changes are likely to fail.

Need

Ateb is undergoing a lot of change, OFW was a change affecting the entire workforce; a quick-win targeting a culture-change.

OFW looked at creating an agile workplace; attracting and retaining talent, equipping people to deliver a better service, building a culture based on trust, togetherness and empowerment; using technology and customer expectations to deliver our services thus remaining competitive in the market therefore, less likely to face a merger (EV. 1).

CIPD (2018) recognise a PESTLE Analysis provides insight into external factors which can impact an organisation assisting in strategic decision-making. Ateb has no formal PESTLE Analysis rather identifying risks within its Strategic Plan (EV. 2). I generated a PESTLE Analysis (EV. 3) through my University studies evaluating Ateb's external marco-environment referring to the Strategic Plan: it concluded the potential for mergers across Wales (Smith, B. 2018); flexible working due to demographics and work-life balance in order to attract and retain talent; and exploring technology-fit for a modern organisation. OFW drivers were; external such as political, environment, social environment and technology spanning both internal and external drivers. CIPD (2018) state there are various drivers of change like competitive pressures, mergers, customer pressures, new legislation or learning new behaviours and skills.

Objectives and benefits

- To create an agile working environment to attract, retain talent offering better work-life balance.
- To be competitive by offering excellent benefits, flexibility using technology to deliver this service.
- To be change-ready increasing organisational effectiveness in the ever-changing business environment.

Change-capability teams were established on commencement of the project focussing on different elements of OFW, like working environment and competitive benefits reflecting a bottom-up approach. I was a key member of such a focus group. This encompassed trust, togetherness and empowerment demonstrating new ways of working, learning from one another, increasing employee engagement and sharing knowledge from other organisations to achieve OFW objectives. Previous change at Ateb has been met by employee resistance; this was identified as a gap in the OFW success. Hence, involving employees in OFW from instigating the change and continuing to be major contributor in OFW means the change was less likely to fail (EV .4).

Once ideas were generated from focus groups they were reported to senior management and i2i (employee engagement group), a decision was made on which elements were to be incorporated in the change project (EV. 5). HR were fundamental in leading and implementing the project.

CIPD (2018) recognise the importance in matching Ateb's goals to its environment therefore, I prepared a SWOT Analysis (EV. 6) capturing data listing strengths and weaknesses for the whole process of OFW realising the specific threats and opportunities present.

Those affected by the changes and their potential information and support needs

I developed a Stakeholder Map (EV. 7) identifying stakeholders who have a shared interest ascertaining their involvement in OFW and their level of influence and interest in the project. It detailed why the changes were necessary, together with the information required. Internal stakeholders were only identified in the Map. The Map assisted in establishing my own role and key function for the overall change and was the basis for developing the Change Plan. I emailed my manager the SWOT Analysis and Stakeholder Plan gaining agreement for both (EV. 8, EV. 9).

Prosci (ND) reflect a structured process is sought to deliver the outcome identifying equipment and support from individuals. To ensure this, I met with key people on the Map to discuss their positions and requirements to implement change. Mindtools (ND) state focus should be on wider impacts of change such as people; individuals and teams moving from one situation to the next, as all people are touched by change, with change not happening in isolation, affecting the whole organisation. It is recognised stakeholders are powerful; with their support improving the quality and success projects.

Abudi (2015) propose developing a Communication Strategy in the early infancy of change. It is useful as the audience is identified together with what and when people are communicated; building awareness ensuring all stakeholders are regularly communicated with (Prosci, ND). This is important to understanding change; from an individual's perspective rather than organisational. Stakeholder input throughout the life cycle of the change is beneficial as challenges can be shared allowing stakeholders to be effective in their roles. I therefore devised a Communication Strategy (EV. 10). I emailed the Communication Assistant my draft, requesting a meeting to discuss its implementation and emailing this to my manager (EV.11, EV. 12, EV. 13, EV. 14).

Resources required and how these will be made available

The HR department is small, therefore, resources like time are scarce. This was a huge project consequently, the amount of time to implement the change was a key factor, which was identified in the Communication Strategy. When necessary, timescales were adjusted due to the heavy workload within the HR team.

Resources required to manage the change were:-

Ensuring all deadlines were diarised allowing time within the working day to prepare documents like Role Profiles and Amending Main Terms of Employment (EV. 15).

Preparing in advance a Data Protection Impact Assessment (DPIA) before purchasing BreatheHR. (EV. 16)

Purchasing BreatheHR software allowing employees to self-manage booking absences direct with their line-manager. Cost was minimal as this is not contractual rather monthly payment ceasing the contract at any point.

Updating BreatheHR with personnel information.

Booking meeting rooms to train departments' and line-managers' on BreatheHR and the Trust Clock (EV. 17).

My role covered all the above points, bar one, therefore, I used a Gantt Chart to ensure I met the timescales (EV. 18) together with the Change Plan.

Devise a plan, including objectives, actions and timescales for implementing the change.

OFW is a radical change project affecting all employees with various stakeholders across the Group contributing. Resistance for OFW was not expected as it was communicated from well before formal consultation with the involvement of focus groups (EV. 4).

My manager set a timescale at the beginning of the project which I used (EV. 19) to devise a Change Plan Version 1 (EV. 20) from this point, referring to the SWOT, Stakeholder Map, and incorporating the Communications Strategy to ensure key points were covered: -

Stakeholder teams - identifying key teams responsible for realising the change.

Individual stakeholders - identifying key roles and individual responsibilities.

Vision and objectives - identifying the vision and objectives following consultation.

Activities required to achieve objectives - detailing individuals and team tasks, setting target and revised dates.

Milestones – these were significant points in the process for realising the change.

Scope for change and people affected - listing those affected by the change.

Communications Strategy – this was completed at the beginning of the process it was important to refer to and include to ensure key message, audiences, risks and tactics were again detailed in the Change Plan.

S**upport being offered** – this included briefing sessions to departments and line-managers.

Monitoring activities – diarised dates to email key stakeholders who had responsibilities in delivering the change ensuring the project ran efficiently.

Timescales – were regularly referred to, communicating updates to my line-manager and when needed addressing concerns and actioning points to remain within time constraints. Different versions of the Change Plan were created as timescales altered.

Measuring success – it was important to measure OFW by engaging with line-managers and employees; this will be achieved via continuous feedback, line-manager catch-up groups and utilising future engagement surveys. The latter is scheduled for March therefore, this element of the Plan is still outstanding.

Communicate the Change Plan

Following devising the Change Plan emailing my Manager to gain agreement (EV. 20, EV. 21, EV. 22). This was important as I could have overlooked a critical stage. At the same point, I attached

a Gantt Chart to show I had considered my own responsibilities (EV. 18, EV. 21, EV. 22). On her approval; I shared the Change Plan with key stakeholders asking for their input, whether they envisage any difficulties and their approval (EV. 23).

2

Following the plan to implement change processes

Johnston et al. (2017) recognise the best planned projects can fail due to poor implementation with too many activities happening at the same time. To mitigate this risk, I used the Change Plan assessing potential problems, creating newer versions of the Change Plan (EV. 20, EV.24, EV. 25, EV. 32, EV. 33, EV. 35), when necessary.

I used the Change Plan I devised to establish objectives my manager set me as an individual and those which I shared joint responsibility with my colleague. My colleague and share a room therefore, we discussed objectives and deadlines throughout the day; assisting one another to achieve tasks keeping the project on track (EV. 26).

I ensured I gave stakeholders like ICT information they would need to carry out their objectives; a newly devised supervisor and manager list for Ateb and its Group. Traditionally, absences have been authorised by Managers only; with the introduction of BreatheHR supervisors will be able to approve absences for their teams. This new flatter hierarchy needed to be reflected on WhosOnLocation (EV. 27, EV. 28).

I was mindful at this stage of three of five sequential milestones within the AKDAR model to achieve success in implementing the project:-

Awareness: utilising the Communication Assistant to promote the Communication Strategy, the Change Champions from the focus groups ensuring everyone was aware of the goals within OFW and the reasons for changing (EV. 29).

Desire: creating a shared sense of purpose promoting Ateb's DNA and Vision ensuring that everyone wants the changes, as much as, practical.

Knowledge: ensuring there was training on systems like BreatheHR, WhosOnLocation and Trust Clock from briefing sessions to holding "how to" sessions.

Line-managers and supervisors were important to ensure they had both desire and knowledge of OFW and were briefed accordingly (EV. 30, EV. 31).

(Fuller, 2016)

Information and support to stakeholders in line with their identified requirements

When stakeholders needed information or support I was able to provide this via:-

Regularly updating my manager by emailing her, when necessary, revising the Change Plan (EV. 32, EV. 33, EV. 34, EV. 35). When these were approved, I emailed newer versions of the Change Plan to stakeholders ensuring additional responsibilities or revised dates (EV. 36).

Initiating diary appointments for briefings ensuring everyone went to sessions, when they were unable, holding one-to-one sessions to achieve objectives (EV. 37).

When updating Role Profiles discussing information being merged ensuring accuracy and rectifying any anomalies. Due to the recent changes within Ateb, many Role Profiles did not reflect current role titles, salaries or specific terms of employment and responsibilities therefore, I liaised with line-managers, my own manager and my colleague who was updating Main Terms of Employment reflecting the latest changes (EV. 26, EV. 38).

Using a Gantt Chart ensured I worked to target dates re-drafting the chart to reflect amended dates, when issues arose verbalising these to my manager to ensure completion of objectives (EV. 38, EV. 39).

Instructing line-managers clearly setting out their own responsibility for embedding the Trust Clock or using BreatheHR. I stressed the importance of becoming role models, ensuring Ateb was change-ready and the use of two-way communication between other line-managers to establish norms and best practice relating the Trust Clock. I found solutions to direct queries that arose liaising with my manager giving accurate advice to scenarios (EV. 30, EV. 31, EV. 38, EV. 40).

Instructing teams on the Trust Clock and BreatheHR (EV. 41), again providing scenarios when answering direct questions (EV. 42). Following employee briefings on the Trust Clock one member of staff in the Finance department which I am lead within the HR team for, had specific queries relating to her Role Profile; I was able to answer these queries amending documentation enabling the staff member to sign documentation relating to the consultation (EV. 43). I physically assisted individuals with BreatheHR helping them navigate the system like; cancelling, editing holidays or other similar issues (EV. 44).

When my manager asked for the pro rata calculation of holiday entitlement for the period of December. I calculated the amount emailing my manager with the calculation (EV. 38). I verbally informed the Chief Executive of the amount and discussed whether the amount would be given in the current annual leave period or from the new annual leave year. Details of which were re-laid at Trust Clock briefings.

I reminded ICT of their duties and responsibility to brief employees on WhosOnLocation (EV. 36).

Maintaining positive working relationships throughout the change processes

Focus group members were fully engaged in OFW and acted as unofficial Change Champions utilising a bottom-up approach which (CMI, ND) state is advantageous. They regularly communicated with colleagues: the proposal; the benefits and their own involvement throughout the project (EV. 4).

The HR department have been instrumental in OFW prior and throughout implementation, it is usual for HR to be less involved after implementation. Techniques used to maintain positive relationships throughout the change demonstrating: situational judgement; open communication; fairness; employee engagement; and visibility to line-managers and employees were:-

Actively encouraging employee voice; requesting feedback which was stressed at all briefings in the first instance, to their direct supervisor or line-manager, then HR. Line-managers were encouraged to set-up a Yammer group offering peer guidance (EV. 45).

To ensure HR are involved in the process, dates have been diarised for drop-in sessions which line-managers and supervisors were asked to attend; currently one has taken place (EV. 45). These discussed the impact OFW is having on the workforce and individual teams. It will be a point, whereby emotional reactions can be discussed; success stories or those who feel that the change is not working and to discuss why this may be. This will aid with building integrity and trustworthiness in the new system maintaining momentum throughout the process. This is essential to pinpoint where, if any, the biggest problems are and if there is any resistant to the change to date (CIPD, 2018; Mulholland, 2017; CMI, ND; SHRM, 2015).

The 4Es principle model educate, engage, empower and enable have been utilised through OFW as a way to change mindsets, build skills in order for the many changes to be successful.

Educate: achieved through briefing sessions enabling the workforce to learn the new process, keeping them updated on changes.

Engage: achieved by advocating regular feedback which is two-way communication.

Empower: achieved by Senior Management replacing the command and control traditional approach via restructures, introducing new systems and processes, introducing better conditions, trusting employees and removing boundaries allowing ownership encouraging development throughout the change process.

Enable: achieved by creating the right environment, asking employees to provide solutions empowering leadership at all levels.

(Geraghty, 2019).

Monitor the effectiveness of the implementation, agreeing and making justified adaptations where required.

I continually monitored the Change Plan against progress on goals and whether milestones have been achieved or likely to be achieved. Initially, I used my manager's dates she diarised to brief the HR team on the project focussing on HR responsibilities and roles (EV. 19), as these needed to be adapted, I created different versions of the Change Plan (EV. 20, EV. 24, EV. 25) and Gantt Chart (EV. 18, EV. 39) which were emailed to her in advance of our catch-up meetings and discussed at these meetings.

I regularly kept my manager updated either verbally, ad hoc or at our regular team meetings agreeing adaptations to the Change Plan. I was able to ensure this by regularly meeting with my manager and other stakeholders ensuring there was regular communication between parties (EV. 38).

I identified corrective action was required regarding briefing the workforce on Yammer and how it operates, as this was originally set for the end of November. Due to the heavy workload within the HR team I knew this would not be priority and a new target date was set; BreathHR and the Trust Clock were central to OFW in achieving Ateb's organisational vision and therefore were not able to be delayed (EV. 34, EV. 35, EV. 38).

Maintain records of the change plan in line with organisational requirements.

It was my manager's responsibility to ensure the Chief Executive was kept informed of progress; to do this I needed to ensure my manager had up-to-date information of the project. I was able to do this; by keeping her updated by a variety of documents like the Change Plan (EV. 20, EV.24, EV. 25) and its different versions together with my own Gantt Charts (EV. 18, EV. 39). When necessary I was able to brief him direct, for instance, when asked what stage the project was at.

When updating Role Profiles, I was required to update an administrative page with the appropriate version number, correct role title to ensure the correct version could be used in the future. This was an important control and quality procedure (EV. 46).

I liaised with the GDPR Officer, Julie John relating to the DPIA seeking advice and instruction for the assessment to be approved by her manager and on its approval recording in the appropriate GDPR folder for reference (EV. 47).

3.

Measure the effectiveness of the change process in meeting the required objectives

Monitoring OFW has been limited; Ateb have not to date utilised employee surveys. This is an objective for April 2020; where staff surveys will measure OFW (EV. 20, EV,24, EV, 25).

Following the last two sequential milestones of the AKDAR model, **ability** and **reinforcement**, HR wanted to ensure both employees and managers did not revert to old practices therefore drop-in manager sessions have been set-up encouraging feedback. This established how well systems are working in practice and an opportunity for managers to start to formulate and share "norms and best practice". It is envisaged in three, six, nine- and twelve-months Survey Monkey questionnaires will be designed gauging peoples' feelings and perceptions in order to make modifications. Measurements will be against objectives like has Ateb created an agile working environment, is Ateb competitive, or whether long-term data will illustrate introducing special leave has decreased sickness absence. Until this point the drop-in sessions will be an important measurement of OFW effectiveness.

Drop-in sessions were diarised for line-managers and supervisors to discuss effectiveness and to clarify whether the Trust Clock has been well received and what, if any, adaptations are required. Only one session has taken place due to the time of year, this was not well attended; their response was that overall the Trust Clock has been well received, there is greater motivation within teams; they feel they will build better trust within their teams empowering their relationship by being able to apply special leave however, it is currently too early in the process to measure this. Any potential for resistance due to perceived conflict like one person being granted special leave and another being refused with the employee viewing their leave request as similar, has to date not occurred. Line-managers stated that they feel able to apply special leave and cannot, at this stage, feel there will be ill-will towards OFW. This is an ongoing process (EV. 45).

I produced a small Survey Monkey questionnaire which I circulated to a small group of people for the departments I am responsible for requesting feedback on OFW (EV. 48, EV. 49). I made it clear that this survey is not from Ateb and I designed this for my University studies. A snapshot of results: 100 percent of respondents liked the systems; feel it offers a better working environment and competitive benefits; 80 percent stated it was conducted in a timely manner and there was collective buy-in; 90 percent could use BreatheHR easily; although 40 percent believe there was potential risks associated with the system; generally WhosOnlocation was easy to manage; and 50 percent stated OFW was excellent and 50 percent believed it was very good.

My manager has written a statement detailing my involvement in the OFW (EV. 38).

Identify further work required to embed changes and/or further developments required.

Performance Incentive Programme (PIP), Salary Review including overtime and mileage rates are due to be benchmarked in April 2020. These key areas were omitted from OFW due to time constraints. The workforce was briefed at line-manager and employee briefings that these items will follow OFW, commencing at the beginning of March 2020 in readiness to instruct consultants. As with OFW, a focus group will be formed ensuring employee involvement from the start; therefore, this is an area for development and this part of the project will evolve over time (EV. 38).

Communication is key throughout the project therefore I have emailed the Communication Assistant (EV.50) to reiterate that success stories should be featured on social media platforms concerning OFW. These will be viewed by prospective employees, attracting future talent emphasising Ateb is a great place to work.

Communicate the key outcomes and the impact of change to stakeholders

I achieved this by meeting with my line-manager, my colleague and the Communication's Assistant updating them on results from the Survey Monkey I designed. This was a good starting point to assess how communication methods used have streamlined new working practices and whether they are embedding. I followed this up by emailing the Communication Assistant with this information asking her to circulate this on Yammer (EV. 50).

The questionnaire was sent to a small group of people; therefore, the results are limited due to the questionnaires reach only gathered to assist in my University studies. Measurements will begin in March 2020 for all employees. Line-managers and employees were included ascertaining how OFW was conducted, whether HR could have done things differently and whether systems are being easily used, lastly if there has been any negativity towards OFW (EV. 48, EV. 49).

Information obtained at drop-in sessions were discussed although key outcomes and impact were limited due to only one session taking place.

Evaluate the effectiveness of own performance in contributing to the management of change.

Through my studies I have adequate base knowledge on change management approaches having a satisfactory understanding of the advantages and disadvantages of these. I do require greater knowledge directly being involved in the future, with change processes from their infancy.

Using the CIPD (ND) New Professional Map, I have identified: -

I am currently operating at technician level, when reflecting against the Professional Map 2013 (CIPD, ND). The New Professional Map however, illustrates the many skills required to undertake change which I have demonstrated during my part in delivering OFW: I have prepared: a SWOT; PESTLE Analysis; Communication Strategy; Stakeholder Map; ascertained resources and equipment required; and designed, implemented and executed a Change Plan, identifying milestones together with other planning tools such as Gantt Chart, although this is relative as I have focused on my team's and my responsibilities not the entire process for all stakeholders. In previous years, change has been implemented and executed using a top-down approach by HR and Senior Management, OFW was one of the many change projects being led by focus groups breaking from traditional structures and demonstrating a bottom-up approach.

To be effective and contribute fully to change I need to be operating at an associate level (CIPD, ND); undertaking the above for the entire change process and working effectively from commencement with Senior Management and all departments across the Group; leading the change not being part of a small section. I have prepared a Development Plan using the CIPD Professional Map 2013, which is an assessment of my skills and abilities, focussing on behaviours I wish to improve and how I plan to achieve this (EV. 51).

I believe that being part of the focus group and undertaking key responsibilities throughout OFW has equipped me for future change management and I will be more confident when taking a greater level of responsibility. My weaknesses are: leading in change; having a broad range of insight both external and internally; coaching; and engaging with Senior Management.

To evaluate my own performance, I used Survey Monkey creating a short questionnaire which I sent to a small group of people to the departments' I lead with (EV. 52, EV. 53). Out of 17 people selected to answer the questionnaire 12 responded. From analysing these results; I briefed the

overall changes very well; I answered questions well however, although most people found the content I gave excellent, two respondents stated very good.

ateb better living solutions

EV. 1

People
Service Area Improvement Framework 2018 - 21

SA/12 Recruitment & Selection
SA/13 Learning & Development
SA/14 Wellbeing
SA/15 People Management

OUTCOMES

SA/12 – Attract and retain the right talent
SA/13 – Equipping people to deliver a better service
SA/14 – Ensuring our people are mentally, physically and emotionally healthy to enable them to realise their potential
SA/15 – Highly motivated and innovative team culture

FOCUS

To achieve our outcome, we will focus on the following top 2 aims:

PEOPLE
To maximise our peoples potential

ORGANISATIONAL DEVELOPMENT
To maximise our structure and culture to increase organisational effectiveness in an ever changing business environment

STRATEGIC PLAN PRIORITIES

The people service areas will relate to most of our strategic priorities and service area delivery in some form. The flowing priorities directly relate to this service area:

SP1/D: Culture
"We need to establish our ateb culture or DNA and collectively make that culture real. We need to develop communication channels and learning loops to make sure everyone feels part of the whole."

SP1/F: Resources
"ateb has had an excellent performance record, we need to continue to maximise our operating margin and return on investment. We aim to have an operating margin of at least 35% for the social housing business and greater than 28% for the group as a whole, over the next 3 years. We will look to develop a standardised approach to monitoring return on investment."

SP2/C: Agile Team Structure
"Our team structures should support our service delivery plan, we will evolve the use of our resources and leadership hierarchies to make sure that we have the agility to tailor our services for changing customer expectations."

SP2/F: Our Future Workplace
"Technology and customer/colleague expectations are challenging traditional conventions on how and where we deliver our services. At the same time, ateb group wants to develop a team DNA across our colleagues and partners. We will initiate a project to review our future workplace options and propose how our offices' use technology, working patterns, role profiles and other related workplace issues can be aligned to our purpose, DNA and delivery of our 3 strategic aims."

SUMMARY

To deliver our people outcomes we must be able to recruit, retain, develop and support the right people who are able to work in a culture that is built on trust, togetherness and empowerment, and in an organisation that supports and is responsive to our customers' changing expectations.

DELIVERING OUR OUTCOMES

To deliver on our aims is challenging, especially as at the core is people; individuals who have their own behaviours, needs and aspirations.

PEOPLE

To maximise our people's potential

- We must ensure that we maximise the skills and expertise that our people bring to the organisation, supporting them to develop as our needs change
- We must ensure that we are inclusive in everything we do and promote equality of opportunity ensuring people are treated with dignity and respect
- We must ensure that our recruitment is effective, not only communicating the technical skills and experience required, but also the ateb DNA
- We must continually review our ability to recruit, with specific reference to more senior and specialist roles which are often hard to recruit. How can we "future proof" ourselves against these difficulties?
- We must ensure that we keep up to date with the legislation and best practice that influences the way we interact with our people

- All our interactions with our people must always be GDPR complaint
- We must ensure that we continue to work with i2i and develop additional feedback channels to ensure our people are able to inform our future decision making and review the effectiveness of our people initiatives
- Our process maps will be key to ensuring that we deal effectively and efficiently with our people
- We need to identify the right people management and information system to support agile working whilst enabling meaningful performance data to be extracted - link to digital transformation
- We need to ensure strategies are in place to support the health and wellbeing of our people as the need to become more agile and flexible increases, with particular emphasis on supporting our people through change
- We need to ensure that our reward strategy addresses the needs of our people whilst at the same time ensuring it is affordable and effective
- We must know our people services are good, not assume they are good.

ORGANISTIONAL DEVELOPMENT

To maximise our structure and culture to increase organisational effectiveness in an ever changing business environment

- We must continually review our structure in line with the changing business environment in order to identify the changes required to ensure we "future proof" the organisation
- We must continually benchmark and keep up to date with best practice adopting systems, process and initiatives that will support our Vision
- We must ensure that the change process is managed effectively in order to ensure that our people embrace change and see it as an essential part of our organisation's survival
- We need to ensure that there is a return on our investment in the OPSIS Leadership & Development programme, our leaders need to share the tools and techniques throughout the organisation – we are all leaders
- We need to develop our DNA and ensure that there are regular "checks" throughout the year to test if our DNA is a reality
- We need to create a safe environment that encourages feedback amongst our people at all levels which will support improvement #InYouWeTrust

- We must continue to develop the new format of i2i to make it more effective in terms of decision making

SUMMARY

Our people priorities are centred on understanding our customers, our people and ensuring that we support the organisation to future proof itself in this ever changing and challenging business environment.

IMPROVEMENT PROPOSED

Actions we are planning to undertake:

Year 2 – 2019/20

1. Implement Role Profiles and develop template for "mini" RP for use in recruitment
2. Implement the outcome of the Our Future Workplace and PIPS consultation exercises
3. Review and re-launch Achieve
4. Implement a new software system to support Our Future Workplace
5. Undertake process mapping exercises on main people service hubs
6. Obtain customer views in relation to contact options with the team
7. To launch the People & Communications Team
8. Develop and trial new corporate and local induction programme
9. Develop a Health & Wellbeing induction booklet to support the new corporate induction
10. Continue to promote and develop the ateb DNA
11. Review i2i group feedback and implement actions where required
12. Continue to develop service hubs as point of reference for service/team information
13. Ensure learning from OPSIS is embedded into the organisation
14. Property Services Review
15. Customer Services Review

Year 2 – 2020/21

1. Review options for the "organisational barometer" to test the temperature on issues i.e. Is our DNA a reality?
2. Review options for implementing a new people management and information system that supports paper free interactions with people – link to Digital transformation
3. Ensure implementation of Our Future Workplace is reviewed and regularly feedback is received from the team and managers to ensure this has been implemented effectively and consistently and that it is "fit for purpose"
4. Develop tender documents for the Remuneration Review and engage with external consultants
5. Develop and implement Passport to Work
6. In liaison with i2i develop and implement the Wellbeing Plan

7. Review policies and procedures in line with the process mapping exercises and ensure in line with legislation and best practice
8. Establish feedback options to ensure the team receive feedback from our customers – don't assume things are OK
9. Ensure improvement actions from process mapping are actioned
10. Consider options to "grow our own" e.g. higher apprenticeships to mitigate risks from recruitment difficulties
11. Ensure learning from OPSIS is embedded into the organisation
12. Develop Equality and Diversity/Unconscious Bias training to promote inclusivity
13. Other departmental reviews

Our teams will need to develop briefs for the priority projects that detail clear project outcomes, costs, training and support and timelines for delivery.

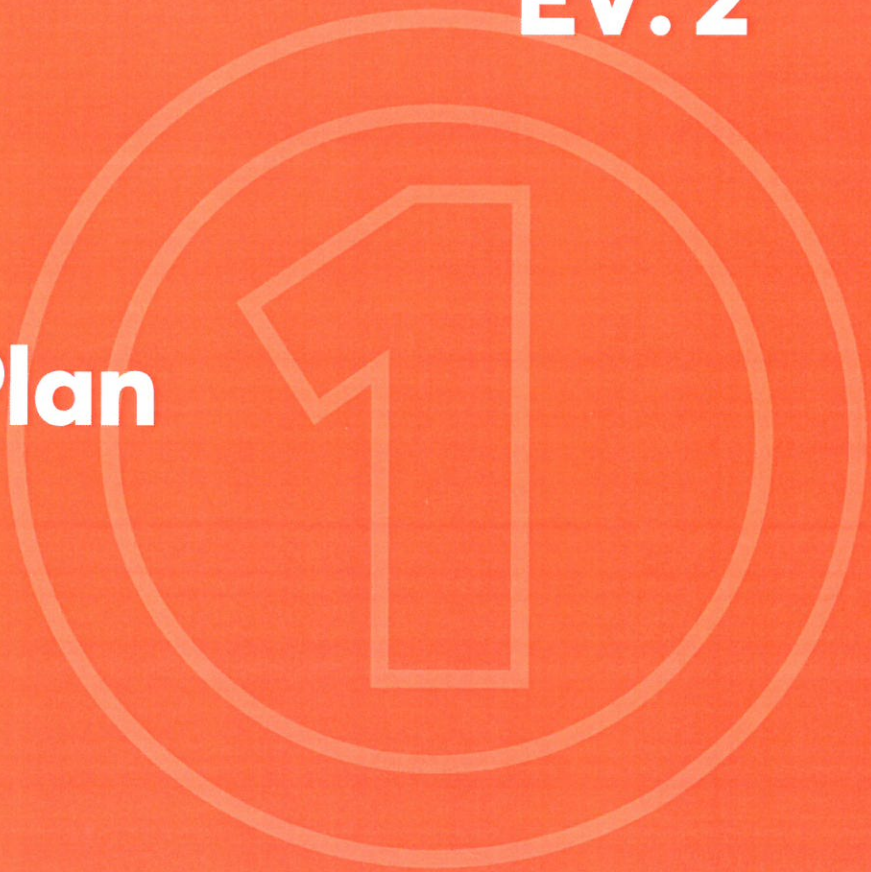
IMPROVEMENT OVERVIEW

We cannot operate without our people. We need to ensure we have the right people with the right skills working in the right structures with a culture that supports this. We must also ensure that we have effective methods of supporting our people in terms of their development, health and wellbeing.

EV. 2

Year One

Strategic Plan Review



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3/ Board Overview

8/ Meeting our challenges

9/ Aim 1: Increase Corporate Strength

11/ Aim 2: Improve Service Delivery

13/ Aim 3: New Business Growth

15/ Financial Update

20/ Managing our risks

21/ Do we still have the right strategic priorities?

Meeting our challenges

All our identified challenges remain but we would identify the following updates as follows:

The additional challenges of the independent affordable housing review outcomes (Due 2019) will need to considered within our strategic planning reviews through FY 2019/20.

The impact of Brexit is likely to be better understood during FY 2019/20.

The Welsh Government issued its first lesson learnt report during FY 2018/19, we will review all such reports and respond to the risks identified appropriately. We have reconsidered our approach to H&S and in particular Compliance Works in light of the first report. We will continue to monitor this area of our business.

The Welsh Government enhanced their commitment to good governance through the year and have introduced the Annual Statement of Assurance (as opposed to compliance). We are planning the introduction of our assurance framework #5 Assure during FY 2019/20.

The following sections review our progress against the strategic aims and priorities set at the beginning of FY 18/19.

We have used the following key to measure our progress against the strategic priority timetable the impact the priorities are having on our aims:

Key:

★
Progress limited

★★
Progress made but behind plan

★★★
Progress on plan

★★★★
Progress ahead of plan

★★★★★
Progress significantly ahead of plan

Managing our risks

We are not looking to change any of the identified strategic risks at this time, we would make the following comments in respect to the identified strategic plan risks as follows:

	Risk types	Year 1 risk report	Issues to consider for years 2 and 3 of the strategy
A	Compliance	• There has been significant review of our compliance works and H&S systems following the Grenfell tragedy and the CCHA lessons learnt report. ateb have responded with a full review of our approaches and the introduction of new systems to ensure compliancy	• Compliance works will remain a high priority
B	Financial	• The independent housing review could have positive/negative impacts to ateb • Brexit will be better understood through 2019/20 • Funding requirements have increased	• Continue to monitor housing review and Brexit implications • Funding proposals to be agreed and placed
C	Reputational	• No change to strategic risk assessments	
D	Performance	• No change to strategic risk assessments	

Do we still have the right Strategic Priorities?

The following discusses whether the Board consider the strategic priorities are having the desired impact on our 3 strategic aims:

Priorities commenced in FY 2018/19

Priority	Priority progress	Is the Priority having the desired impact on our Aims
SP1/A Rest Assured	Was planned to be implemented by the end of FY 2018/19, will now be implemented by the end of FY 2019/20	Yes
SP1/C Governance Improvement Plan	Ongoing throughout plan, new actions around appraisal, remuneration, board membership and training to be implemented in FY 2019/20	Yes
SP1/D Involve	Ongoing throughout plan, i2i to be updated in FY 2019/20 following proposals received form the team	Yes
SP2/B Engage	Ongoing throughout plan, continue to evolve the e2i concept	Yes
SP2/C Agile Team Structure	More directorates to follow the housing directorate review format	Yes
SP2/D Strategic Asset Management (SAM)	Ongoing through remainder of plan, work to start in 2019/20 following a delayed start	To be established

Continued overleaf

Area	Description	How affects organisation	Impact on HR Function
Political	Pembrokeshire has been allocated circa £1.5m for the year and draw down 58% of SHG for each development (Cole, 2018)	Pressure to secure financial lending to make the difference between SHG and lending rates. Uncertainty with Brexit and higher interest rates in the future (Ateb, no date).	Could lead to building less therefore redundancies in development team, redeployment could be likely.
	Potential of merging housing associations (Ateb, no date); Barker, 2018)	To add value to be competitive.	Redundancies, redeployments, organisational design exploration.
Economical	Introduction of Universal Credit (UC) (Ateb, no date; Hickman, 2018).	As all new claimants will be migrating to UC, most of our residents will receive their housing payment directly into their bank accounts. Previously, Housing Benefit has been paid directly to the HA and this amount of money was expected monthly. HAs will need to chase this directly from the tenants as there is potential for increased rent arrears.	A new system has been developed by the Department of Work and Pensions, HR need to ensure that Housing Officers and Customer Services are fully skilled in UC. Job creation of debt collectors and extensive training for current welfare & benefit money advisors and potential expansion of the team resources long-term.
	Current economy	The position of the economy can affect the organisations hiring pool. Workers don't want to leave secure jobs and others will not have the correct set of skills and abilities to meet the job role (CIPD, 2018)	HR needs to be prepared for downfalls in the economy and have a plan in place to overcome it. HAs to put a strategy in place for workplace planning.

		Brexit – Welsh Government receiving European Funds for training and fixed term positions. HAs unsure of the future (Ateb, no date; Department for Business, Energy & Industrial Strategy, 2018) therefore will need to factor increased costs of training and funding for fixed term jobs currently created by EU funding or be willing to pick up surplus costs for training/employment received in this way themselves.	Time to be dedicated to locating training providers that can provide training at affordable prices. Working collaboratively with HAs to share training costs and develop a relationship for other potential areas.
Economical	Current economy	Brexit – uncertainty can see increased interest rates which will affect lending rates (Morris, 2018), increased competition for land, increased costs to the supply chain of primary materials when building new developments and contractors' tenders.	Could lead to building less therefore redundancies in development team and across the entire organisation is likely. Redeployment options should be explored. HAs will need to retain employees (as they are likely to seek secure employment elsewhere) therefore will need to ensure they are competitive offering comprehensive benefits and employee engagement initiatives.
Sociological	Flexible working (Ateb, no date).	With the increase of working parents/grandparents (BBC, 2017), the HA is having to be increasingly flexible to meet family-friendly	Re-evaluate culture of organisation and adapt procedures and policies in line with flexible working. Specifically, look at family friendly policies for families with

		demands and to be able to compete in a competitive market. Work-life balance is a top priority for many people when seeking employment especially millennials. Applicants may overlook other benefits and prioritise flexible working (Kohill, 2018). HR function has had difficulty when recruiting some vacancies as many have requested flexible working but have been unable to approve this request.	caring responsibilities. Ensure fairness and consistency is maintained. Re-evaluate job roles to increase flexibility in departments where appropriate ensuring equality. This will add value to the HA and HR practices and attract and retain the right talent.
	Flexible working (Ateb, no date).	Due to the nature of the organisation, it is difficult to offer flexible working for staff as there is a dedicated Customer Services team that are required to work the opening times (Nutland, 2018).	Perceptions of unfairness may arise therefore HR should work with the department to develop a flexible working system to accommodate their service. HR to meet with similar sectors and organisations to gather best practice.
Sociological	Flexible working (Ateb, no date).	Aging population (ONS, 2018).	Data analysis to assess who in the HA has young families or aging families which would require alternative options. Run projects and gather comparative data from other HAs. Succession planning in readiness for retirement spells and being internally focused through

			promotion/development opportunities.
	Residents living longer (ONS, 2018).	By having residents staying in properties for longer, there are fewer turnovers of homes for those on the Common Housing Register for Housing.	HR need to look at the business strategy and consider if there is a greater need for sheltered housing, if so this would lead to an increase in recruitment for Scheme & Community Coordinator.
Technological	Automation, artificial intelligence, cloud technologies, self-service systems, exploring modern technology (Ateb, no date; Yarlagadda, 2017).	Costs associated with keeping up to date with the latest technologies. Mobile technology for mobile-based staff i.e. Maintenance Operatives. No longer need to speak to Customer Service staff for 'jobs' as information sent directly through software.	ICT department to attend relevant training and keep up to date with technological advances. Recruitment considerations for additional ICT support to support new systems. Training for staff to use new systems. Look at human capital verses virtual applications how this will affect current workforce. Would they need upskilling? Run projects to identify potential redundancies and re-evaluate job roles to ensure limited job losses. Possible re-structuring and organisational design.
Legal	Brexit – employment laws (Ateb, no date).	Employed/ employing non-UK national staff.	Recruitment and retention may be necessary. (Non-UK nationals currently not employed by Ate).

		Removal/changes of European Directive laws following Brexit i.e. EU framework directive on discrimination	HR to stay up to date on changes to employment law by attending seminars/training. If changes occur, ensure policies are updated and implemented effectively.
	National, local and devolved regulations (Ateb, no date).	Constantly changing; changes can affect how HA can operate.	HR to stay up to date on regulations to be aware of any impacts on the HR function. Developing the HR strategy to meet the requirements of the ever-changing business strategy.
Environmental	Global warming.	Switching to sustainable resources and consider ethical sourcing whilst maintaining cost efficiency (Cole, 2018).	Adequate training for the development team on sustainable and ethical options.
	Affordability	Welsh Government have scrutinised Housing Associations on how they're able to ensure that their housing is affordable to all their residents. This includes sustaining homes by fitting efficient heating and solar panels on new developments to reduce fuel poverty. This leads to a higher cost to the organisation at the beginning, which requires more funding but will lead to reduced bills for residents (Cole, 2018).	HR to invest in seeking advice from consultants that can provide sustainable advice to the organisation.

Environmental	Corporate environmental responsibility	Ateb's duty to be environmentally ethical and abstain from damaging natural environments (John, 2018).	Ethical and environmental implications should be considered in relation to HR practices and policies. Changes to environmental priorities to be updated in policies i.e. use of plastics. HR to be role models of being environmentally friendly.

From: Tom Waters
To: Kate Houston
Subject: Request for a statement on our Focus Group work.
Date: 14 January 2020 13:01:55
Attachments: image003.png

Hi Kate

Please find below my statement regarding my experience of working in our Focus Group.

Ateb were looking at improving our processes and created several focus groups tasked with different areas of improvement. I joined the "looking at improving our future workplace" focus group along with around 5 or 6 others, one of which was Kate Houston.

At our early meetings we discussed what our future workplace should look like in two parts. Part 1 – how we would work day to day, Part 2 – What our physical workplace would look like.

In part 1 we looked at how we operate day to day, things like our current clocking in and out systems, lunch time restrictions, working day restrictions etc.

In part 2 we looked at our physical working environment, such as our building, our desks, our meetings rooms etc.

For both it was clear, we wanted a working environment that offered flexibility along with competitive benefits. We looked at process maps to mark any repeating themes – to identify specific needs, such as meeting rooms for customers to meet with our Housing Officers and Money Solutions Officers, or Training rooms for our Digital Support Team. We asked ourselves what staff would like / need, what customers would like / need, what would make our business more efficient and be cost effective.

Myself, Kate and Jo were tasked with researching organisations that currently work agilely, aligning our proposals with ateb's DNA and Vision. We organised visits to Cardiff to visit 3 businesses that have a similar vision and spoke to staff about what worked well, what they liked and also what they didn't like. We weren't asked to do this but felt It was important to take ownership of the project and use our initiative. We found the visits very positive and helpful.

As a result we came back energised and decided to put together a document that proposed three options for part 1 – how we operate day to day. We spent a considerable amount of time on creating a document that had different levels of innovation and changes to our current working patterns. We presented the options and our findings / research to i2i and Senior Management and asked them to choose which option they liked the most, and then we would continue to develop that idea further. We proposed a timeline of actions and deadlines to demonstrate we didn't just want this to be a case of we present something and they listen, then nothing happens. We wanted to clearly demonstrate that we have taken ownership of the task set and are intending on seeing the changes through to implementation.

This was big cultural change at ateb as previously matters like this were decided by Senior Management and no employee engagement was present.

As I write this today we are around a month since ateb introduced major changes to the way we work

(clocking in/out is gone, specific lunch times are gone, working from home is permitted etc). Many of the changes ateb have implemented were proposed in our presentation/document and its fair to say we had a considerable impact / were key advocates for these changes.

ateb have seen other positives of doing things like this, as direct result of the focus group leading, we were able to communicate our proposals to our colleagues and achieve much more buy-in from colleagues.

The group is still working on part 2 – What our physical environment will look like so I guess - it's to be continued…

Thanks

Tom



EV. 5

Our Future Workplace

#We Are ateb

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OUR FUTURE WORKPLACE

Draft proposals on how we work @ateb in the future

Please find attached a summary that captures the current thoughts, ideas and potential proposals arising from the i2i working practices task & finish groups and subsequent conversations and discussions.

The package of ideas all relate to the principles we set in our Vision document last year (we have previously referred to it as The Manual but are now going to call it what it is – our Vision). The updated Vision document will be available on our Yammer site for your reference along with the full #2 DNA supporting document that details more about role profiles, achieve (our proposed appraisal process) and @ateb. As agreed we will hold workshop sessions to go through this information with opportunities to ask questions. **This summary pack includes:**

- Working @ateb - the draft principles that will govern how we work at ateb in the future
- Trust Clock flash card - this gives more detail on how the 'trust clock' could work
- Benefits flash card - this gives more detail on how we could package our benefits in the future

In the meantime, please discuss the ideas with your colleagues and let us have thoughts on the proposals, either collectively or individually through your manager, HR or i2i by 2nd March. Following your feedback, we will review the proposals again, will make any amendments we feel would improve the proposals based on your feedback and we will then decide how to take forward to a consultation stage.

i2i are also thinking of changing to a format similar to United Welsh where the i2i team is made up of Senior Management and Colleagues to allow quicker and better decision making on key issues relating to working practices @ateb.

We believe this package will start us on our journey towards the flexible and agile organisation we outlined in our Vision last year, so please let us know what you think!

Nick
Chief Executive

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@ateb

We aspire to having a working environment that attracts and retains the right skills and expertise to allow us to improve and grow our services for the people and communities of West Wales.

This means having the right working practices, Terms & Benefits and infrastructure aligned to The Vision with a particular emphasis on our DNA:

#InYouWeTrust
#AccessAllAreas
#GetThingsDone

Our DNA promotes an environment of trust, togetherness and empowerment, to create this we have developed a **Leading Principle...**

@ateb
Leading Principle...

"We must always put the customer, business, team and H&S first when planning and delivering our role profile responsibilities and service area outcomes."

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Working @ateb

Having met our Leading Principle, this is how we do things @ateb, we...

- Will continually review and adjust our individual working arrangements to align to the leading principle.
- Can all help to improve things by supporting the i2i team groups and participating fully in the Achieve Framework.
- Work our standard hours working week, or part time hours by arrangement.
- Seek to offer our customers access to as many of our service areas as possible between 8am and 6pm on weekdays and other times and/or days by arrangement, all in addition to our 24hr digital services.
- Each have an office or mobile base available to us but are free to choose our place of work to suit our outcomes by using technology and diaries to ensure our managers and teams are aware of our plans.
- Operate a 'trust clock' system where we are all trusted to manage our working weeks on a 'give and take' basis – it's about what we achieve!
- Take time out by taking our standard holiday plus any additional days at the discretion of ateb (usually to be taken at Christmas).
- Agree any special leave directly with our line managers depending on the circumstances.
- Can take our holiday in hours rather than full or half days to increase our flexibility to balance work and outside work commitments.
- Receive learning and development prioritised against the needs of our service area and business and receive support for professional membership.
- Have an allowance of days per year for everyone to support activities of ateb's chosen charities.
- Don't want people to be ill, but when they are we have a short term illness plan with additional levels of support for more critical, longer term illnesses.
- Have systems that fairly remunerate our teams for their efforts and levels of responsibility within the group.
- Will consider non-consolidated annual financial rewards where the Board have identified exceptional improvement and growth, subject to personal performance factors and affordability issues.
- Can all benefit from wellbeing programmes throughout the year and can access a health cash plan, counselling sessions and free eye tests.
- Want to create a great place to work so we have free parking, in work refreshments, have work/social team events organised through i2i, and have great facilities for our customers and teams a like.
- Are all able to access a monthly team meeting and access the right information through great communication channels.
- Can call a 121 meeting to suit our needs but must have at least 1 per quarter.

flash card

04

Trust Clock

Purpose:

To give all an overview of how we account for our time @ateb

Who needs to know?

All ateb teams.

In less than a hundred words:

Is a process where teams and individuals agree how they manage their available working hours to meet the demands of their customers.

The ateb leading principle must always be met as it puts our customers, the business, our teams and H&S first when planning and delivering our responsibilities.

Managers will use the leading principle to monitor effectiveness of working arrangements, where the principle is not being met, the manager will need to adjust arrangements. The trust clock is about a trusting, adult relationship that will provide flexibility and agility for ateb and its teams alike,; it must be developed together.

What else do I need to look at?

> The Vision
> DNA
> @ateb

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04 Trust Clock

Key things to note:

> We must always respect the @ateb **leading principle**

> We must all be **accountable** for the standard hours we are required to work each week.

> We will seek to offer services within our operating parameters of 8:00 - 6:00 with agreed exceptions and 24 hr digital support

> Our current opening hours for reception and telephones is 9:00 – 5:00 Mon – Fri.

> Working arrangements must not breach employment law.

How will this work in practice?

1/ Customer - Teams need to review their service area responsibilities, identify their customers and be clear what their customers demand of them across the operating hours.

2/ Standard hours per week - Having established their service area and customer requirements, the team should be able to set their proposed start and finish time for each team member across the week to show how their standard hours will be met.

CHECK: Will the proposed arrangements meet the demands of the service area and customers?

3/ Flexibility - Everyone works their hours, but we recognise that sometimes there needs to be flexibility from either ateb or the team member. Examples could be:

ateb

> A visit to a customer out of hours
> A meeting runs on
> A early or late customer visit

Team Member

> I fancy a longer lunch
> I want to get away early
> I need to take my child to the doctor
> I fancy going home early

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Assuming we are not breaking the **leading principle!** The above flexibility will happen on a 'give and take' basis, i.e.. if I take an extra hour's lunch – I will make it up over the next few days, if I am asked to complete a report that takes an extra hour – I will take it back over the next couple of days. **CHECK: The leading principle must not be broken.** The Trust Clock is not a mechanism for 'building up additional holiday', ateb will provide a competitive annual leave allowance that the teams will be able to use flexibly for planned time off.

4/ Monitoring the trust clock - You will not be required to clock in. Managers will manage outcomes. If team members or managers become concerned that the trust clock is being abused, then this will be raised by the manager as an action that needs addressing on their achievement log and monitored.

5/ What about sickness and medical appointments? If you are sick, you will need to let us know and the sickness policy will apply. If you have a routine medical appointment, you should try and arrange it at a convenient time that meets the leading principle, you will not be required to make the time up.

6/ How about holiday? ateb will provide a competitive annual leave allowance which we will encourage you to take. You will be able to take your holiday in hours and you will be able to carry over 5 days leave from one year to the next. We will not buy back annual leave, we want you to take time out! If there is a need to take more leave than the allowance you have, your manager will discuss the options available.
CHECK: The leading principle must not be broken.

7/ What about special leave? ateb will support you where there are times you may need to take 'Special Leave' e.g. bereavements, other personally stressful situations or activities you may undertake to develop yourself and the profile of ateb. Where this happens, we will agree a special leave of absence particular to your circumstances.

8/ How will I record holiday sickness and special leave? We will invest in technology to allow team members to plan their holiday and record their sickness and special leave.

Need help?

check with your manager then HR

flash *card*

05

Who needs to know?

All ateb teams.

Benefits - Draft

Purpose:

To give all an overview of our potential @ateb benefits

In less than a hundred words:

@ateb sets the principles of how we work @ateb and therefore sets the scene for the main benefits of working @ateb.

Benefits are not necessarily always contractual and can change over time. ateb will always seek to develop and agree its benefits with i2i and in line with our business priorities

What else do I need to look at?

> The Vision

> DNA

> @ateb

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05 Benefits - Draft

The Proposal:

> **Pay Reviews** - We will review the current 3 yearly pay review process to see if there is a better way to meet our @ateb principle - **NB: This will not happen until nearer the next market review planned for mid year 2020/21**

> **PIPS** - PIPS to be based on individual and strategic performance as assessed by the Board - **NB: No change to PIPS in 2018/19, review of pips will be undertaken for year 2019/20 to align to @ateb & Achieve etc**

> **Standard hours** - as current, 37 hours per week

> **Time Clock** - To be replaced with the Trust Clock

> **Family Leave** - To be replaced with the Trust Clock

> **Annual Leave** - All to receive 30 days (+ 3 ateb discretionary days) regardless of length of service. Holiday can be taken in hours (Holiday and Bank Holidays to be pro-rata for Part Time arrangements)

> **Charity days** - All to be able to take 2 charity days a year to support ateb sponsored charities

> **Sickness entitlement** - To remain as 3 month full and 3 months half pay but with a new system for longer term critical illness

> **Attendance bonus** - To be phased out and replaced with Wellbeing initiative below

> **Simply health savings scheme** - No change to current arrangements

> **Wellbeing initiative** - New programme of wellbeing activities through the year to be agreed e.g. cholesterol and blood pressure testing and complementary health remedies, fruit etc.

> **Learning & Development supplements** - To be reviewed as part of the pay review project as above

> **Compassionate leave** - See the Trust Clock

> **Probationary Salary** - To be phased out

> **Maternity, adoption, parental or paternity leave** - No change to current arrangements

> **Long service award** - No change to current arrangements

> **Professional subscriptions** - No change to current arrangements

> **Free Eye Test and Contribution Towards Glasses** - No change to current arrangements

> **Car Parking** - No change to current arrangements

> **Bike facilities** - No change to current arrangements

> **Refreshments** - No change to current arrangements

> **Staff saving scheme** - No change to current arrangements

> **Corporate gym membership rates** - No change to current arrangements with PCC

> **Flu vouchers** - No change to current arrangements

> **Counseling scheme** - No change to current arrangements

> **Car allowances** - To be reviewed as part of the pay review project as above

> **Mileage rates** - To be reviewed as part of the pay review project as above

> **Annual subsidised team party** - No change to current arrangements

> **Call out / Stand by** - To be reviewed as a separate project during 19/20

NB: All subject to consultation

Need help?

Check ¸ ĹŁĶ˜ ŜĂŹ manager and then HR.

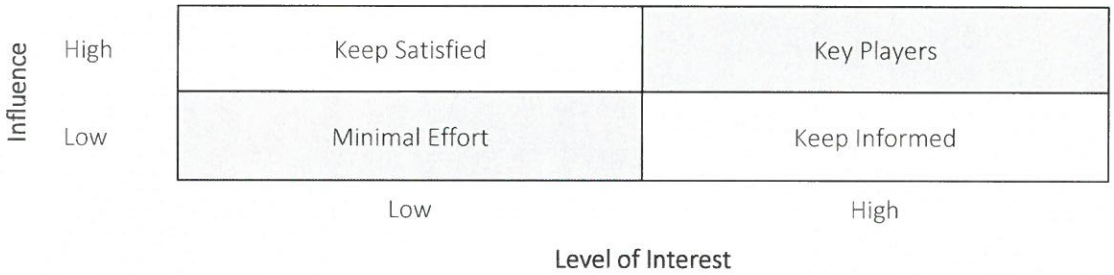
ateb better living solutions

STRENGTHS	WEAKNESSES
Already taken place: • Led by focus groups • Communicated openly to all workforce through a presentation of the intended vision • Managers briefed on DNA, Vision and strategy • Followed by a formal consultation • Clearly communicated the vision ensured the continuing direction of the envisaged change empowering people to be committed and engaged to the changes • Drive organisational effectiveness (ACAS, ND) • Drive Ateb's brand and reputation • Trust clock #InYouWeTrust • Self-managed absence management system • Agile working • Role clarity by launching Role Profiles for all job roles • Achieve – continuous feedback • Good working environment • Re-issuing Main Terms detailing: **Competitive benefits:** 30 days annual leave 3 Additional days at Ateb's discretion 8 Bank Holidays 3 Charity Days Enhanced sick leave (currently 3 months full pay, 3 months half pay) offering an additional 3 months half pay for critical illness **These benefits have been examined against a competitive market** • Removal of 97.5% probationary salary • PIPS equal lump sum subject to full time equivalent • Implementing a wellbeing plan	• Communication failure • Lack of time to implement (Brightline, 2018) • Lack of readiness (Brightline, 2018) • Resistance • Removal of flexi and TOIL – people loosing current balances can feel aggrieved • Removal of attendance bonus • Feeling of lack of consistency and fairness • Lack of norms • Them and us mentality (line-manager and employee differences) • Being always available and able to work • Buying software 'BreatheHR' • GDPR risk assessment • GDPR requirements • Working Time Breaches • Risk Assessments • DSE Assessments • Onus on employee to check mortgage, insurance implications • Whosonlocation roll-out relying on ICT team • People using Yammer platform • People using Achieve • People using Whosonlocation
OPPORUNTITIES	**THREATS**
• Change-readiness (Mindtools, ND) • Communication plan detailing key messages	• Line-manager support • Employment relations if badly executed can lead to resentment and distrust (ACAS,ND)

• Communicate regularly often repeating the same messages (ACAS, ND) • Regularly 'mood check' how people are feeling throughout the change (ACAS, ND) • Attracting talent (ACAS, ND) • Becoming an employer of choice • Industry trends (CIPD, 2018) • Building positive working relationships (ACAS, ND) • Strengthening line-manager and team relationships triggering positive discretionary behaviour (ACAS,ND) • Listening to feedback gauging peoples perspectives and willingness to modify if necessary • Survey engagement levels • Review and evaluate • Training workforce (line-managers, teams and ad hoc individuals) Mindtools (ND)	• Role Profile confusion – impact on future remuneration • Cost of investment (CIPD, 2018)

Stakeholder Mapping Launching Our Future Workplace

Stakeholder Influence/Interest Matrix



Stakeholder Grouping

Stakeholder Name	Influence Level	Level of Interest	Stakeholder Grouping	Why Necessary	Information Required
Chief Executive including Senior Management Team	High	Low	These are key players who are fully engaged in OFW. They have the greatest power to influence and make decisions however, will not be involved in the day-to-day operation of the project thus communication should be regular, keeping them informed and when needed consulting with them asking for their views and feedback. It is important that they have interest; in the project; your work and your achievements.	• Regular consultation is required • Culture-ready • Role modelling behaviour	• Regular updates of progress
Brief Line-managers	High	High	It was important to keep these stakeholders informed and satisfied. Regularly communicating the messages without overloading them. They will be key to implementing the message to their teams and the success of the change.	• Regularly update key messages • Role modelling behaviour • Culture-ready • Embedding the changes	• Regular updates of progress • Briefing sessions

Focus groups (change champions)	High	High	These are key players who are fully engaged and whom will make the greatest effort for the change to be successful. These stakeholders will communicate the change and its proposed effectiveness.	• Role modelling behaviour • Culture-ready	• Regularly updated enabling them to drip feed employees regarding changes
HR Manager	High	High	Key player who is fully engaged in implementing the change to ensure success. The HR Manager's reputation is tied to OFW therefore communication should be frequent.	• Expertise and advice throughout the process	• Regularly updated to ensure success of process
Communication's Assistant	High	Low	Key player who will need to be fully engaged; although level influence is minimal. It is paramount that regular messages of communication are issued throughout the process.	• To spread the word of changes to increase positivity across the organisation	• To be given up-to-date information
GDPR Officer	High	High	GDPR of any system must be sought therefore any system requires a risk impact assessment which the GDPR Officer will be both kept informed and kept satisfied throughout the process that all legal requirements are being met.	• To ensure legal requirement is met	• Risk Impact Assessment is duly completed
ICT	Low	Low	ICT influence requires minimal effort and their level of interest is to be kept informed of changes as they are not heavily involved with implementing the changes. ICT do have a higher interest level for Whosonlocation due to purchasing the software and implementing training on this, otherwise throughout the change process they can be kept informed.	• Technical support if required	• Provide dates of new systems being implemented in case support is required
Departmental teams	Low	High	Keeping these stakeholders satisfied by keeping them informed regularly briefing them to ensure no major issues arise. Stakeholders can be supportive and helpful throughout the change process. These stakeholders have minimal influence however, are key players in ensuring the change is successful.	• Culture-ready • Embedding the changes	• Briefing on new systems and processes

From:	Kate Houston
To:	Victoria Evans
Subject:	OFW
Date:	29 August 2019 10:54:07
Attachments:	SWOT.docx Stakeholder Map.docx

Hi Tori

Further to our conversation regarding OFW I thought it would be advantageous to prepare a SWOT analysis which I have attached. Please can you look at this and let me know whether I have missed anything. I have also attached a Stakeholder Plan.

If you are happy with these, I will met with Poppy to develop a Communications Plan.

Thanks.

Kate

From: Victoria Evans
To: Kate Houston
Subject: Re: OFW
Date: 02 September 2019 11:04:57

Thanks Kate
That's really helpful I can make use of this in my talks with Nick
Tori

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From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Thursday, August 29, 2019 10:54:07
To: Victoria Evans <Victoria.Evans@atebgroup.co.uk>
Subject: OFW

Hi Tori

Further to our conversation regarding OFW I thought it would be advantageous to prepare a SWOT analysis which I have attached. Please can you look at this and let me know whether I have missed anything. I have also attached a Stakeholder Plan.

If you are happy with these, I will met with Poppy to develop a Communications Plan.

Thanks.

Kate

Our Future Workplace - Communications Strategy	
Profile	Ateb Group is based in Haverfordwest, Pembrokeshire working across West Wales 'creating better living solutions' for its people and communities. It employs 126 staff; Ateb is a housing association and is the parent company to Mill Bay Homes, West Wales Care and Repair and Effective Building Solutions.
Issue	Ateb Group has re-evaluated its Main Terms offering better benefits, removing flexi operating on a trust clock treating people as adults. It focuses on outcomes rather than time spent at your desk recognising the need for flexibility creating an agile working environment. Achieve has been launched based on continuous feedback linked to outcomes replacing the traditional appraisal system. Traditional job descriptions have been replaced with Role Profiles providing clarity of roles linked to Ateb's culture, strategy and service areas.
Research	Staff surveys have not been utilised within the Group therefore, to date employee engagement has been limited. Research has been conducted by focus groups who have scanned the market for competitive working conditions. These were presented to senior management and Board for consideration and approval.
Communications objectives	• To raise awareness of the proposed changes. • Influence behaviours and mind-set. • To address anxieties, concerns or any potential resistance before, during and after implementation of the planned change. • Embed the changes.
Audiences	All employees across the Group from cleaners to line-managers to senior management.
Key messages	• The leading principle " we must always put the customer, business, team and H&S first

	when planning and delivering our role profiles responsibilities and service area outcomes" • Promote agility and flexibility across the Group. • This is the beginning not the end we may need to tweak processes and systems. • We will be known as an employer of choice thus attracting talent. • Agile working requires different skillset from people hence Role Profiles. • Trust. • Ownership and freedom from agile working is a big cultural change.
Tactics/channels	• Announcement – 'big picture' message delivered by Chief Executive and senior management via a presentation. • Formal consultation – giving people the opportunity to provide feedback. • Transitional arrangements – line-managers to deliver a presentation "on what good looks like at Ateb". • HR to update line-managers through a presentation on Our Future Workplace. • HR to update teams at team meetings on Our Future Workplace. • Information uploaded to Yammer. • Information on noticeboards and around the office. • Implementation onwards – feedback given to either HR or line-managers.
Risks	• Technology not in place. • Mind-sets and behaviours of line-managers and teams. • Potential delays. • Time to implement. • Staff morale. • Resistance due to losing the attendance bonus and flexitime. • Anxiety over Role Profile.

Measurement	• Acquire feedback at meetings • At all stages before, during and after implementation ask for feedback. • Remember real insights, real actions. • Deliver on feedback show people have been listened to and we have learnt.
Review	• Evaluate processes and systems and when necessary modify. • Line-managers to set up a Yammer group to discuss and start to set norms learning from one another. For instance is 6 weeks of special leave too much should they not exceed 3 weeks? • Line-manager regular meeting to discuss what is working well in their teams and what is not. • HR to talk to the teams direct; is it making a difference.

From: Kate Houston
To: Poppy Kucyj
Subject: OFW
Date: 02 September 2019 12:08:47
Attachments: Comms strategy.docx

Hi Poppy

Please can we meet to discuss OFW. I have been tasked with drafting a Communication Strategy, which I have prepared and attached for your consideration. I would really like your input as I think two heads will be better than one!

Thanks.

Kate

From: Poppy Kucyj
To: Kate Houston
Subject: RE: OFW
Date: 02 September 2019 14:17:21

Hi Kate,

Yes no problem, we will meet to discuss. I have had a look over the document and think it's really informative. I especially like the key messages and this is a direction that I will ensure to follow with regards to my Communication. It will help me focus on my key messages.

Poppy Kucyj
Communications Assistant

Tel | 01437 763688
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, rhowch 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.

From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Monday, September 2, 2019 12:08:47
To: Poppy Kucyj <poppy.kucyj@atebgroup.co.uk>
Subject: OFW

Hi Poppy

Please can we meet to discuss OFW. I have been tasked with drafting a Communication Strategy, which I have prepared and attached for your consideration. I would really like your input as I think two heads will be better than one!

Thanks.

Kate

From: Kate Houston
To: Victoria Evans
Subject: OFW
Date: 03 September 2019 15:55:30
Attachments: Comms strategy.docx

Hi Tori

I have prepared a Communication Strategy. I have already consulted Poppy – she is happy with this. What do you think?

Thanks.

Kate.

From: Victoria Evans
To: Kate Houston
Subject: Re: OFW
Date: 03 September 2019 17:04:57

Thanks Kate
That's fantastic both.Tori

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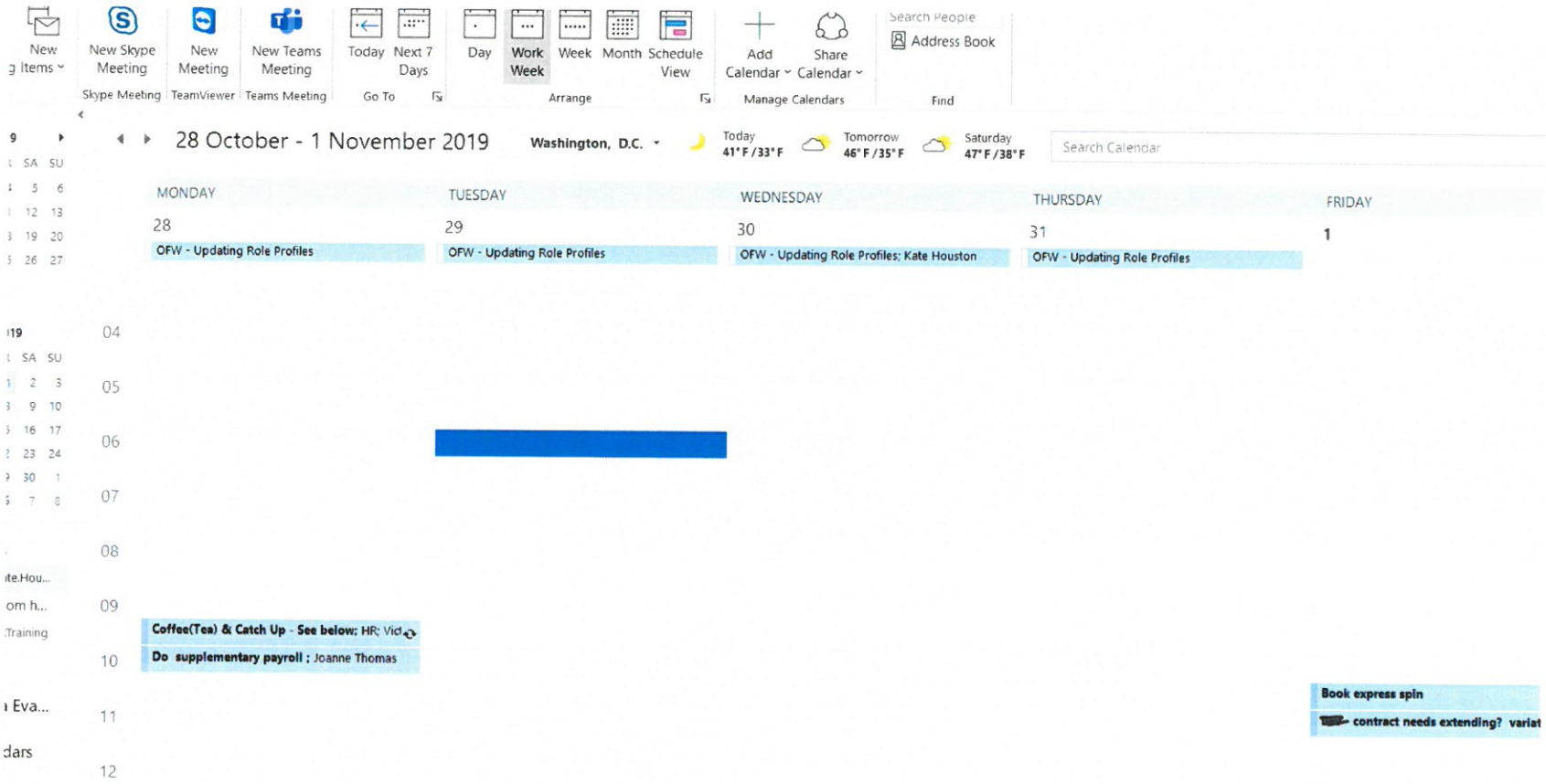
From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Tuesday, September 3, 2019 15:55:30
To: Victoria Evans <Victoria.Evans@atebgroup.co.uk>
Subject: OFW

Hi Tori

I have prepared a Communication Strategy. I have already consulted Poppy – she is happy with this. What do you think?

Thanks.

Kate


New Items
New Skype Meeting
Skype Meeting
New Meeting
TeamViewer
New Teams Meeting
Teams Meeting
Today
Next 7 Days
Go To
Day
Work Week
Week
Month
Schedule View
Arrange
Add Calendar
Share Calendar
Manage Calendars
Search People
Address Book
Find
28 October - 1 November 2019
Washington, D.C.
Today 41°F/33°F
Tomorrow 46°F/35°F
Saturday 47°F/38°F
Search Calendar
MONDAY
TUESDAY
WEDNESDAY
THURSDAY
FRIDAY
28
29
30
31
1
OFW - Updating Role Profiles
OFW - Updating Role Profiles
OFW - Updating Role Profiles; Kate Houston
OFW - Updating Role Profiles
04
05
06
07
08
09
10
11
12
Coffee(Tea) & Catch Up - See below; HR; Vid
Do supplementary payroll ; Joanne Thomas
Book express spin
contract needs extending? variat

ateb better living solutions

This template allows you to record your Data Protection Impact Assessment (DPIA) and outcome. Start to fill out the template at the beginning of any major project involving the use of personal data, or if you are making a significant change to an existing process. Integrate the final outcomes back into your project plan.

Step 1: Identify the need for a DPIA

Explain broadly what the project aims to achieve and what type of processing it involves. You may find it helpful to refer or link to other documents, such as a project proposal. Summarise why you identified the need for a DPIA.
Breathe is hosted as a cloud-base HR system Web based software:- • Self-service absence booking such as sickness and holidays arranged by employee/supervisor. • Next of kin details. • Medical health details. • Personal details including equality and diversity data. • Absence analysis and reporting. • Training details. • Document management – communication tool storing documents online keeping employees informed.

Step 2: Describe the Processing

Describe the nature of the processing: how will you collect, use, store and delete data? What is the source of the data? Will you be sharing data with anyone? You might find it useful to refer to a flow diagram or another way of describing data flows. What types of processing identified as likely high risk are involved?
Cloud-base HR system Web based software; data will be used to store absence details, next of kin data, personal data (see above). Data will be retained for 6 years – the system after which point send a reminder to the HR user to manually delete the leavers record (as long as the reminder is set-up there should be no breach). Data accessible by employees/supervisors and HR team. • Administrators HR only – access to all data. • Line-managers and Supervisors – Restricted access only have access to own department.

- Employees – own data only.

Describe the scope of the processing: what is the nature of the data, and does it include special category or criminal offence data? How much data will you be collecting and using? How often? How long will you keep it? How many individuals are affected? What geographical area does it cover?
Employee data self- managed and by HR for approx. 130 employees – please see information specified in question 1. Information will be updated when booking or taking absence or any other events i.e. training/medical appointment, updating on a self-service as and when by employee. Sensitive data such as medical information, equal opportunity etc… 6 years retention.

Describe the context of the processing: what is the nature of your relationship with the individuals? How much control will they have? Would they expect you to use their data in this way? Do they include children or other vulnerable groups? Are there prior concerns over this type of processing or security flaws? Is it novel in any way? What is the current state of technology in this area? Are there any current issues of public concern that you should factor in? Are you signed up to any approved code of conduct or certification scheme (once any have been approved)?
Employers – employees are aware how we process their data via privacy notices. Some control to change personal details, book leave but main control rests with HR user as administrator. HR. Net currently hold such data – no privacy/risks highlighted.

Describe the purposes of the processing: what do you want to achieve? What is the intended effect on individuals? What are the benefits of processing for you, and more broadly?
Agile practices; using cloud technology allows employees to access and update information from anywhere.

Step 3: Consultation Process

Consider how to consult with relevant stakeholders: describe when and how you will seek individuals' views – or justify why it's not appropriate to do so. Who else do you need to

involve within your organisation? Do you need to ask your processors to assist? Do you plan to consult information security experts, or any other experts?
This will be communicated to all employees:- • Via Our Future Workplace regularly updates • Department workshops ran by HR explaining how to access and use the system • Supported by pictorial guidance.

Step 4: Assess necessity and proportionality

Describe compliance and proportionality measures, in particular: what is your lawful basis for processing? Does the processing achieve your purpose? Is there another way to achieve the same outcome? How will you prevent function creep? How will you ensure data quality and data minimisation? What information will you give individuals? How will you help to support their rights? What measures do you take to ensure processors comply? How do you safeguard any international transfers?
• Data is held is a secure data centre in the United Kingdom – none of the data leaves the European Union therefore the software complies with data protection regulation. • Breathe uses HTTPS encryption that ensures data is always encrypted as it travels from their services to the web browser. • Data and code synchronised, backed up and kept for seven days and on the 1st of each month for three months • Devices are encrypted with username and passwords per individual user.

Step 5: Identify and assess risks

Describe the source of risk and nature of potential impact on individuals. Include associated compliance and corporate risks as necessary	Likelihood of harm	Severity of harm	Overall risk
Unauthorised access by individuals	Remote	Minimal	Low

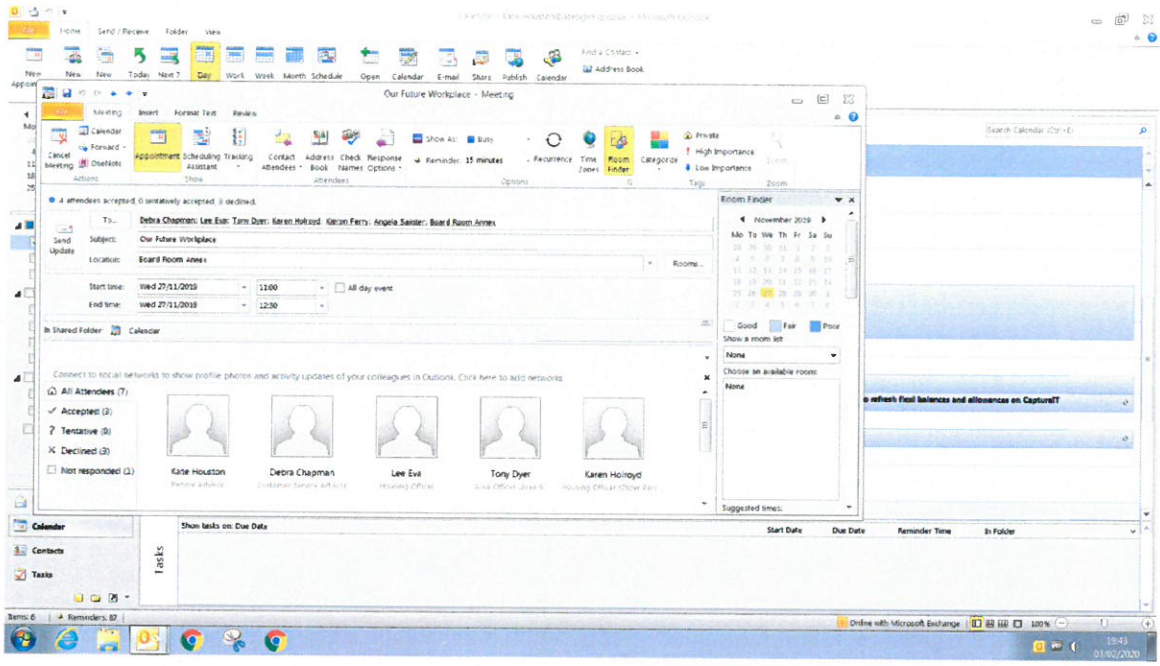
Step 6: Identify measures to reduce risk

Identify additional measures you could take to reduce or eliminate risks identified

as medium or high risk in Step 5.				
Risk	Options to reduce or eliminate risk	Effect on risk	Residual risk	Measure approved
Unauthorised Access to account	Ensure passwords expiry is set to 42 days	Reduced	Low	Yes
Device Theft	Device encryption and 'wipe' options	Reduced	Low	Yes

Step 7: Sign off and record outcomes

Item	Name/date	Notes
Measures approved by:		Integrate actions back into project plan, with date and responsibility for completion
Residual Risks approved by:		If accepting any residual high risk, please contact the ICO before proceeding
DPO Advice provided:		DPO should advise on compliance, step 6 measures and whether processing can proceed.
Summary of DPO advice:		
DPO advice accepted or overruled by:		If overruled, you must explain your reasons
Comments: N/A		
Consultation responses reviewed by:		If your decision departs from individuals' views, you must explain your reasons
Comments: N/A		
This DPIA will be kept under review by:		The DPO should also review ongoing compliance with DPIA


Our Future Workplace - Meeting
Debra Chapman; Lee Eva; Tony Dyer; Karen Holroyd; Kieran Ferry; Angela Sainter; Board Room Annex
Our Future Workplace
Board Room Annex
Wed 27/11/2019
11:00
12:30
All day event
Kate Houston
Debra Chapman
Lee Eva
Tony Dyer
Karen Holroyd
Room Finder
Tasks

OUR FUTURE WORKPLACE: Kate Houston's key duties Version 1

Task	09-Sep	16-Sep	23-Sep	30-Sep	07-Oct	14-Oct	21-Oct	28-Oct	04-Nov	11-Nov	18-Nov	25-Nov	02-Dec
Amend and check Role Profiles for all employees													
Send out Main Terms, Role Profiles and generic letter regarding consultation and changes													
Complete a GDPR risk assessment													
Purchase BreatheHR													
Calculate annual leave entitlement from 1st December to 31st December													
Set up new responsibility rights for line-managers and supervisors for their teams													
Set-up BreatheHR with your departments teams													
Provide BreatheHR training to teams													
Brief line-managers, supervisors re: Role Profiles, DNA, leadership, service delivery and hubs and Trust Clock													
Brief teams re: Role Profiles, DNA, leadership, service delivery and hubs and Trust Clock													
Brief workforce on Yammer how it operates and its benefits													

EV. 19

OFW Roll Out plan

Task	Date/Month	Detail	Who	
1	30th September 2019	Send out electronically pack (post where necessary). Pack to contain: • Letter – generic • FAQ & Timeline - generic • Main Terms and Conditions (personalised) • Role Profile (personalised) • Working @ ateb – generic	P&C	Still working on them.
2	October 2019	Promotion/reminder of purpose of Role Profile • Why the need for change • Link to DNA, leadership, service delivery/hubs	P&C PK	Meet the teams and explain
3	< 18th October 2019	Liaise with ICT & H&S&R Manager and ask them to undertake the following: • Promote the need for Who's On – duty of care etc • Ensure everyone is on Who's On Location and app is downloaded on everyone's work device. • Offer to download app on personal devices • Ensure all notifications of not clocking in/out go to the correct line manager • Provide training package (on-line) and possibly drop in sessions for staff to learn how to use package (including specific line manager session with support of H&S&R Mgr)	ICT SD VE PK	
4	<18th October	Agree with Managers who can authorise leave etc	VE	

	2019	in teams (Breathe set up)		
5	<18th October 2019	P&C to develop briefing sessions for managers and line managers in relation to changes in Working @ ateb document	P&C	Kate likely to be on leave as timeline pushed back so may need support in developing/delivering briefings.
6	< 25th October 2019	Calculate additional A/L for all staff for 1st November to 31st December	KH/JT	Plan to do this after mail merge before going on holiday but want to do this before this date
7	< 25th October 2019	Set up Breathe (GDPR) data questionnaire to do with JJ	KH/JT/JJ	Meet with all and complete a questionnaire after I have done the annual leave calculations again before going on holiday
8	w/c 28th October	Promotion of Breathe – main benefits and send out link for staff to look at – launch date 1st Jan 2020	KH/JT/PK	Prepare a workbook with basic snippets of how to use the system
9	w/c 28th October	Promotion of Who's on to be launched • ICT to send out training/hold drop in sessions • Line Manager briefing (with H&S&R Mgr) to cover duty of care and process if not clocked out etc	ICT SD PK	
10	w/c 28th October	Briefing sessions for line managers on changes: • Special leave • Trust Clock etc	P&C	Speak with Nick and you and produce a document as guidance then run through this with individual managers! This will need to be done before I go away
11	w/c 28th October	Promotion of changes to teams & how to: • Special Leave • Trust clock etc • Attendance at team meetings/informal chats with teams	PK/KH/JT	Speak with Nick and you and produce a document as guidance! This will need to be done before I go away

12	< 1st November 2019	Additional A/L to be added onto Capture IT records for all staff and staff to be advised of additional leave 1 day Charity Day to be added to individuals records – to take by end of March 2020	KH/JT	Need to discuss can this be done before I go away
13	< 15th November	Training session on Breathe to be developed to cover: • Making changes to details • Checking A/L and requesting in hours • Checking calendars • Recording sickness • Requesting/recording special leave • Company/important documents to read • Specific line manager Highlight that more options in Breathe and we will be looking at expanding this over the next 12 months where appropriate	KH/JT	A document should be produced that we can run through with our groups
14	< 1st December 2019	Populate Breathe with team data and set up ready for 2020	KH/JT	Will think about this after I return from holiday as I will know where I am with things
14	< 31st December 2019	Draft Wellbeing plan to be discussed with i2i and costed plan agreed for roll out in 2020/21	KH	Will think about this after I return from holiday as I will know where I am with things
15	< 31st December 2019	Training sessions to be held with line managers on Breathe Training sessions for staff on how to use Breathe	KH/JT	Will think about this after I return from holiday as I will know where I am with things
16	< 31st December 2019	Extract key data from Capture IT in relation to sickness, leave etc When is contract due to end? –	KH/JT	Will think about this after I return from holiday as I will know where I am with things
16	1st January 2020	Launch of Breathe	P&C	

Change Plan for Our Future Workplace (OFW) in relation to tasks set

Created by	**Kate Houston**
Date	**Sep-19**
Version	**1**
Stakeholders Teams	**Responsibility Key (RK)**
People & Communications team	P&C
ICT team	ICT
Governance	G
Stakeholder Individuals	
Victoria Evans - P&C	VE
Kate Houston Evans - P&C	KH
Joanne Thomas Evans - P&C	JT
Poppy Kucyj Evans - P&C	PK
Julie John - Governance	JJ
Steve Townley - ICT	SD
Vision and Objectives	
Our Future Work Place creating an agile organisation whilst maximising our peoples potential by our structure and culture increasing organisational effectiveness to remain competitive	
• Devise new Main Terms and Conditions	
• Devise new Role Profiles	
• Implement Trust Clock creating greater flexibility	
• Implement Achieve	

Activities to achieve objectives *(attach Gantt chart)*	**RK**	**Target date**	**Revised Target date**	**Achieved**
Roll out information to senior management team on OFW	VE	18 September		
Roll out information to managers on OFW	VE/JT/KH	18 October		
Update Main Terms and Conditions for each individual	JT	30 September		
Update Role Profiles for each individual	KH	30 September		
Deliver Main Terms and Conditions, Role Profiles and generic letter regarding the consultation and changes	KH/JT	30 September		
Complete a GDPR impact risk assessment before purchase of Breathe	KH	25 October		
Purchase BreatheHR an absence management system	VE	1 October		
Calculate individual annual leave entitlement from 1st December to 31st December	KH/JT	1 November		
Set up and agree new line-manager/supervisory levels for BreatheHR	KH	October		
Populate BreatheHR with key data	JT	1 December		
Brief Teams on Trust Clock raising awareness of key changes	KH/JT	28 October		

Provide BreatheHR training step-by-step guide; how to change details, checking annual leave balances, requesting leave in hours, checking calendars, recording sickness, requesting special leave, company/document documents to read system to line-mangers and teams	KH/JT	31 December		
At briefing meetings with line-managers and supervisors promote Role Profiles linking the need for change, DNA, leadership, service delivery and hubs	KH/JT	28 October		
Use different methods of communicating the messages on platforms such as Yammer	KH/JT	Ongoing		
Brief workforce on Yammer and how it operates	P&C	End November		
Promote the need for Whosonlocation – duty of care	SD	18 October		
Ensure everyone is set up on computers, laptops and mobile devices	ICT	18 October		
Ensure line-managers and supervisors have the correct teams reporting to them on Whosonlocation	SD/ICT	18 October		
Provide training on Whosonlocation	SD/ICT	28 October		
Communicate regularly changes through the medium of posters and Yammer posts	PK	Ongoing		
To fully roll-out Achieve Framework, providing training to line-managers and employees with the use of MS Teams	KH/JT	March		
Employee engagement surveys	KH/JT	April		
Milestones		**Target date**	**Revised Target date**	**Achieved**
1st - to brief Senior Management and Managers		End October		
2nd - update key documents and issue to employees		30 September		
3rd - Implementation of BreatheHR, Whosonlocation		End December		
4th - Implementing Achieve Framework		March		
5th - Feedback in the form of employee surveys		April		
People affected - refer to Stakeholder Map				
Directors				
Line-managers and Supervisors				
Teams				
Communication strategy	**RK**	**Target date**	**Revised Target date**	**Achieved**
Please see attached Communication Strategy	KH	September		
Key Change Champions are Directors, HR, Communication Assistant, line-managers and supervisors.	KH	September		
Support to be offered (*advice, counselling, coaching, mentoring, representation, training - attach, for example, a training plan)*	**RK**	**Target date**	**Revised Target date**	**Achieved**

Roll-out briefing sessions on Our Future Workplace to line-managers and teams split into departments. Providing advice and support. Topics include; Trust Clock, leading principle, new benefits, New Main Terms and Conditions, Role Profiles, Achieve.				
Kate Houston briefing to:				
Customer Services department	KH	28 October		
Finance department	KH	28 October		
Property Services department	KH	28 October		
Governance Department	KH	28 October		
Joanne Thomas briefing to:				
Customer Support department	JT	28 October		
Maintenance department	JT	28 October		
Mill Bay Homes department	JT	28 October		
Care & Repair department	JT	28 October		
ICT department	JT	28 October		
Roll-out briefing sessions on BreatheHR to line-managers and teams split into departments. Providing training and support. Topic include; setting profile up, updating next of kin, using calendar, booking, editing and deleting: annual leave; special leave; sickness.				
Kate Houston briefing to:				
Customer Services department	KH	31 December		
Finance department	KH	31 December		
Property Services department	KH	31 December		
Governance Department	KH	31 December		
Joanne Thomas briefing to:				
Customer Support department	JT	31 December		
Maintenance department	JT	31 December		
Mill Bay Homes department	JT	31 December		
Care & Repair department	JT	31 December		
ICT department	JT	31 December		
Brief workforce on Yammer	KH/JT/PK	End November		
Resources required, including cost *(equipment, time, people, materials, guidance)*	**RK**	**Target date**	**Revised Target date**	**Achieved**
· BreatheHR £214 monthly charge	VE	1 October		
· PowerPoint presentations	KH/JT	Middle December		
· Briefing sessions	KH/JT	28 October		

· Guidance materials	JT	Middle December		
Monitoring activities				
· Continuous feedback from teams	KH/JT	Ongoing		
Success Measures				
· Listening and understanding by continuous feedback				
· Measuring feedback by survey engagement levels				
· Review and evaluate using tools like Survey Monkey				

From:	Kate Houston
To:	Victoria Evans
Subject:	OFW
Date:	06 September 2019 09:57:57
Attachments:	Change Plan V1.xlsx OFW Roll Out gantt chart v1.xlsx

---

Hi Tori

Further to our conversation, I have attached OFW Change Plan. Please can you cast your eye over this and let me know whether you are happy with the document before I role this out. I have used your own timetable to reflect target dates for tasks to be completed.

I have also attached a gantt chart detailing my own responsibilities within the Change Plan.

Thanks.

Kate

From: Victoria Evans
To: Kate Houston
Subject: RE: OFW
Date: 06 September 2019 16:17:58

Thanks Kate

This is very clear and I can discuss with exec team

Tori

Victoria Evans
People and Communications Manager

Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

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From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Friday, September 6, 2019 09:57:57
To: Victoria Evans <Victoria.Evans@atebgroup.co.uk>
Subject: OFW

Hi Tori

Further to our conversation, I have attached OFW Change Plan. Please can you cast your eye over this and let me know whether you are happy with the document before I role this out. I have used your own timetable to reflect target dates for tasks to be completed.

I have also attached a gantt chart detailing my own responsibilities within the Change Plan.

Thanks.

Kate

From: Lyndsey Dafoe
To: Kate Houston
Subject: Re:
Date: 10 September 2019 16:23:15

Hi Kate,

Thanks for sending over the attached plan. Unfortunately, due to some system configuration issues during setup, we are looking at a deadline after 18th October.

Regards,

Kind regards

Lyndsey Dafoe
Service Desk Analyst

Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

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From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Tuesday, September 10, 2019 11:32:33
To: Lyndsey Dafoe <lyndsey.dafoe@atebgroup.co.uk>
Subject:

Hi Lyndsey

Please find attached the Change Plan for OFW – this will helpful to see everyone's key responsibility and whether ICT need to assist such as ensuring everyone has use of laptops etc...

As discussed, you will be responsible for rolling-out WhosOnLocation by the 18th October.

Many thanks.

Kate

Change Plan for Our Future Workplace (OFW) in relation to tasks set

Created by	**Kate Houston**
Date	**23/09/2019**
Version	**2**
Stakeholders Teams	**Responsibility Key (RK)**
People & Communications team	P&C
ICT team	ICT
Governance	G
Stakeholder Individuals	
Victoria Evans - P&C	VE
Kate Houston Evans - P&C	KH
Joanne Thomas Evans - P&C	JT
Poppy Kucyj Evans - P&C	PK
Julie John - Governance	JJ
Steve Townley - ICT	SD

Vision and Objectives

Our Future Work Place creating an agile organisation whilst maximising our peoples potential by our structure and culture increasing organisational effectiveness to remain competitive

- Devise new Main Terms and Conditions
- Devise new Role Profiles
- Implement Trust Clock creating greater flexibility
- Implement Achieve

Activities to achieve objectives *(attach Gantt chart)*	**RK**	**Target date**	**Revised Target date**	**Achieved**
Roll out information to senior management team on OFW	VE	18 September		Yes
Roll out information to managers on OFW	VE/JT/KH	18 October		Yes
Update Main Terms and Conditions for each individual	JT	30 September	Beginning November	No
Update Role Profiles for each individual	KH	30 September	Beginning November	No
Deliver Main Terms and Conditions, Role Profiles and generic letter regarding the consultation and changes	KH/JT	30 September	Middle November	No
Complete a GDPR impact risk assessment before purchase of Breathe	KH	25 October	Beginning November	No
Purchase BreatheHR an absence management system	VE	1 October	Middle November	No
Calculate individual annual leave entitlement from 1st December to 31st December	KH/JT	1 November	Beginning November	

Set up and agree new line-manager/supervisory levels for BreatheHR	KH	October	Beginning November	No
Populate BreatheHR with key data	JT	1 December		
Brief Teams on Trust Clock raising awareness of key changes	KH/JT	28 October	End November	No
Provide BreatheHR training step-by-step guide; how to change details, checking annual leave balances, requesting leave in hours, checking calendars, recording sickness, requesting special leave, company/document documents to read system to line-mangers and teams	KH/JT	31 December		
At briefing meetings with line-managers and supervisors promote Role Profiles linking the need for change, DNA, leadership, service delivery and hubs	KH/JT	28 October		Yes
Use different methods of communicating the messages on platforms such as Yammer	KH/JT	Ongoing		
Brief workforce on Yammer and how it operates	P&C	End November	End February	No
Promote the need for Whosonlocation – duty of care	SD	18 October	Beginning November	No
Ensure everyone is set up on computers, laptops and mobile devices	ICT	18 October	End November	No
Ensure line-managers and supervisors have the correct teams reporting to them on Whosonlocation	SD/ICT	18 October	Beginning November	No
Provide training on Whosonlocation	SD/ICT	28 October	Beginning December	No
Communicate regularly changes through the medium of posters and Yammer posts	PK	Ongoing		
To fully roll-out Achieve Framework, providing training to line-managers and employees with the use of MS Teams	KH/JT	March		
Employee engagement surveys	KH/JT	April		
Milestones		**Target date**	**Revised Target date**	**Achieved**
1st - to brief Senior Management and Managers		End October		Yes
2nd - update key documents and issue to employees		30 September	Middle November	No
3rd - Implementation of BreatheHR, Whosonlocation		End December		
4th - Implementing Achieve Framework		March		
5th - Feedback in the form of employee surveys		April		
People affected - refer to Stakeholder Map				
Directors				

Line-managers and Supervisors				
Teams				
Communication strategy	**RK**	**Target date**	**Revised Target date**	**Achieved**
Please see attached Communication Strategy	KH	September		Yes
Key Change Champions are Directors, HR, Communication Assistant, line-managers and supervisors.	KH	September		Yes
Support to be offered (*advice, counselling, coaching, mentoring, representation, training - attach, for example, a training plan*)	**RK**	**Target date**	**Revised Target date**	**Achieved**
Roll-out briefing sessions on Our Future Workplace to line-managers and teams split into departments. Providing advice and support. Topics include; Trust Clock, leading principle, new benefits, New Main Terms and Conditions, Role Profiles, Achieve.				
Kate Houston briefing to:				
Customer Services department	KH	28 October	End November	No
Finance department	KH	28 October	End November	No
Property Services department	KH	28 October	End November	No
Governance Department	KH	28 October	End November	No
Joanne Thomas briefing to:				
Customer Support department	JT	28 October	End November	No
Maintenance department	JT	28 October	End November	No
Mill Bay Homes department	JT	28 October	End November	No
Care & Repair department	JT	28 October	End November	No
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Kate Houston briefing to:				

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· Briefing sessions	KH/JT	28 October	End November	No
· Guidance materials	JT	Middle December		
Monitoring activities				
· Continuous feedback from teams	KH/JT	Ongoing		
Success Measures				
· Listening and understanding by continuous feedback				
· Measuring feedback by survey engagement levels				
· Review and evaluate using tools like Survey Monkey				

Change Plan for Our Future Workplace (OFW) in relation to tasks set

Created by	**Kate Houston**
Date	**19/12/2019**
Version	**3**
Stakeholders Teams	**Responsibility Key (RK)**
People & Communications team	P&C
ICT team	ICT
Governance	G
Stakeholder Individuals	
Victoria Evans - P&C	VE
Kate Houston Evans - P&C	KH
Joanne Thomas Evans - P&C	JT
Poppy Kucyj Evans - P&C	PK
Julie John - Governance	JJ
Steve Townley - ICT	SD

Vision and Objectives
Our Future Work Place creating an agile organisation whilst maximising our peoples potential by our structure and culture increasing organisational effectiveness to remain competitive
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Finance department	KH	31 December		Yes
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· Continuous feedback from teams	KH/JT	Ongoing		
Success Measures				
· Listening and understanding by continuous feedback				
· Measuring feedback by survey engagement levels				
· Review and evaluate using tools like Survey Monkey				

From: Joanne Thomas
To: Kate Houston
Subject: Statement in respect of Kate Houston.
Date: 06 February 2020 14:47:44
Attachments: image001.png

Statement in respect of Kate Houston.
As a fellow People Advisor at Ateb Group, I worked closely with Kate during the implementation of the Our Future Workplace project.
Kate and I share an office therefore, we discussed our progress and/or concerns on a daily basis. We both had specific roles and responsibilities however, these overlapped and depended on each other therefore, it was essential we kept in regular contact. We both kept our individual lead teams informed through their team meetings about the change process and promoting the vision to gain buy-in.
For example, role profiles and contracts required populating through a mail merge and details double checked. Kate took control of the role profiles whereas, I had the contracts. These both relied on similar progress as we could not progress to the next step until these were completed. Both documents contained similar information such as start dates, job title and salary. Kate would regularly arrange time for us to double check the accuracy of our documents.
We followed the change plan, implementing the objectives assigned to us as planned. If changes were made to the change plan such as dates or updated objectives, Kate would share this with me. Kate would regularly ask me for my progress so we could determine if we were on track or to anticipate delays thus, meeting our own timescales or being able to amend timescales with enough notice. If we revised dates, Kate would update this on the change plan and we would work towards our new agreed date.

Joanne Thomas
People Advisor

Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

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Chief Executive Management

Line-manager:
Nick Hampshire

Responsible for:
Adrian Williams
Nigel Sinnett
Mark Lewis
Victoria Evans
Ceri Barnett

Customer Services, Maintenance and Compliance Management

Line-manager:
Mark Lewis

Responsible for:
Antony James
Jayne O'Hara
Jane Robinson
Dave Tovey

Customer Services

Line-manager:
Mark Lewis

Responsible for:
Ali Evans

Customer Services
And Engagement

Line-manager:
Ali Evans

Responsible for:
John Lagrossa

Finance and ICT Management

Line-manager:
Adrian Williams

Responsible for:
Gareth Williams

Judith Arnold
Steve Townley

Property Services

Line-manager:
Nigel Sinnett

Responsible for:
Wes Cole
Matthew Owens (responsible for MBH)

People and Communication

Line-manager:
Tori Evans

Responsible for:
Kate Houston
Jo Thomas
Poppy Kucyj

Governance

Line-manager:
Ceri Barnett

Responsible for:
Julie John
Debbie Yates

H&S

Line-manager:
Ceri Barnett

Responsible for:
Seamus Doyle

Finance

Line-manager:
Gareth Williams

Supervisor:
Bethan Elliott

Responsible for:
Nicky Phillips
Sarah Elmer
Jase Jones
Merrilee Phillips
+ one to be recruited (Apprentice)

Finance

Director:
Adrian Williams

Line-manager:
Gareth Williams

Responsible for:
Kate Allen
Andrew Smart
Suzy Hobday
Bethan Elliott

ICT

Director:
Adrian Williams

Line-manager:
Steve Townley

Responsible for:
Kingsley Oliver
Lyndsey Dafoe
Adam Clarke

Supporting People

Line-manager:
Jayne O'Hara

Supervisor:
Amy Williams

Responsible for:
Sue Monger
Karen brown
Bill Faichney

From: Lyndsey Dafoe
To: Kate Houston
Subject: Re: OFW
Date: 25 October 2019 16:17:53

Hi Kate,

Thanks for sending this over. This will be really useful for helping me configure the system with the correct triggers to notify managers of their teams activities.

Thanks

Lyndsey Dafoe
Service Desk Analyst

Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

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From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Friday, October 25, 2019 10:28:44
To: Lyndsey Dafoe <lyndsey.dafoe@atebgroup.co.uk>
Subject: OFW

Hi Lyndsey

As requested, this is a list of manager and supervisor authority to use on WhosOnLocation when setting up the system.

Thanks.

Kate

From: Poppy Kucyj
To: Kate Houston
Subject: For Kate
Date: 05 February 2020 17:13:02

I have worked alongside Kate throughout OFW project as a Communications Assistant. We ensured all members of staff were regularly updated and informed to an effective manner before, during and after consultation. As a Communications Assistant I was happy to help assist in keeping everyone informed via emails, Yammer and MS Teams to get these messages out. I was the best person to communicate these messages as I worked alongside Kate so I clearly understood the project, and ensured that the messaged were short, easy to read and were written in ateb's style.

Poppy Kucyj
Communications Assistant

Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

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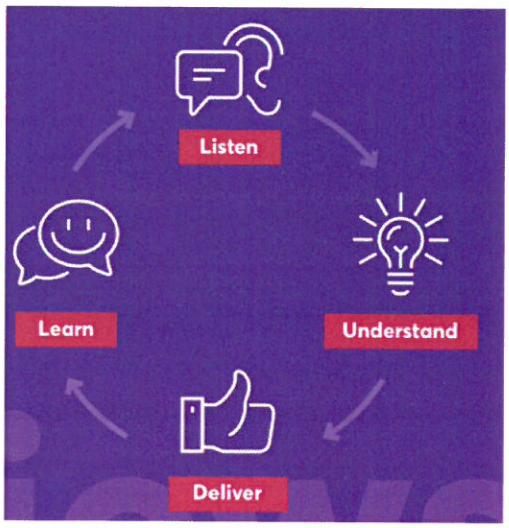
ateb better living solutions

Our Future Workplace

Briefing Sheet – Line Managers

This briefing aims to provide background information in readiness for the communications relating to the outcome of the Our Future Workplace and PIPS consultations.

As the Deliver document sets out, delivering a project or process is not the end, in order to improve there must be a continual process of Listening, Understanding, Delivering and Learning. This project marks a major shift in the way we manage our workplace activities, implementation is not straightforward and there will be pinch points along the way. It is therefore essential that we feedback on progress, that we collaborate and work together to support this implementation, and we are flexible so that we can adapt when we need to – It's our DNA



- Learn – have the elements of the project worked? Could we have done anything differently? Learn from each other – how are we interpreting things?
- Listen – speak to staff (our customers) what do they think? Obtain feedback
- Understand – what is that feedback saying? Do staff need more information? Do we need to tweak processes or systems? Do we need new processes/systems?
- Deliver – deliver on the feedback, show that we have listened and learnt.
  Repeat the process!

Key point of reference in Our Future Workplace is the Leading Principle

"We must always put the customer, business, team and H&S first when planning and delivering our role profile responsibilities and service area outcomes"

Taking People hat off here, how do we fit in as line managers?

A Line Manager - "a person responsible for controlling or administering part of an organisations function and/or group of employees"

It is our responsibility to:

1. Take H&S responsibility for our team – are they safe?
2. To develop our team – 121, training and support, coaching/mentoring etc.
3. Employee administration – agree holiday, sickness return interviews, disciplinaries etc.
4. Performance – employee and function area performance setting, monitoring, reporting and improving
5. Assurance – setting, delivering and controlling cost, quality, time and risk relating to functional area outcomes.
6. Communication – ensuring key messages are shared and understood amongst our teams

Support teams such as P&C and finance etc. offer support and expertise where applicable, but we as managers must take **ownership** and be **accountable** for their line manager responsibilities.

As I move on you will see that this collaboration will be crucial as we roll out this project

Highlighting a few of the main changes

- Absence and Leave Systems:
  Absence and leave recording and management will be moved from Capture IT to Breathe in the New Year. As part of the Digital Transformation Plan software solutions for all HR activities will be reviewed however in the short term we will be using Breathe. This is a cloud based HR software solution which has self service functions for staff resulting in more streamlined process for requesting and authorising leave; staff will have access to a dashboard and team calendar enabling them to check team availability before requesting leave. Annual leave in hours will also be an option. To find out more check out www.breathehr.com

  Work is underway to set up the authorisation hierarchy and P&C Team will be discussing this further with you. Training will be developed and line managers and teams will be briefed on how to use the system.

- Trust Clock:
  Flexi time and TOIL will be going and we will operate the Trust Clock – at a set date which we will notify the teams off all +/- balances will be wiped so please ensure your teams are working towards keeping flexi and TOIL to a minimum over the coming weeks. Teams need to review their customer needs in relation to operating hours before they can set the "start" and "finish" time for their teams and know where the flexibility is in relation to working hours. Some concerns have been raised about a "them and us" situation – there will variances across teams as to how much the Trust Clock can be used - Area Officer teams clearly have more flexibility than the Contact Centre. Always link back to the leading principle if staff raise this as an issue.

  The Trust Clock is all about:

  - Treating people like adults #InYouWeTrust
  - Focusing on outcomes and not the time spent at your desk
  - Recognising that sometimes there needs to be flexibility from either ateb or the individual and the Trust Clock can support this e.g. urgent paper needed, wanting to leave early for parents evening

  The Trust Clock is not all about:

  - Banking time because you want a day off in two weeks
  - Being "available" all hours, every day
  - Ignoring our requirements under Working Time and our duty of care to our teams

  See the flashcard for more information

  We must recognise that we need to establish our norms and therefore it is important that line managers talk to each other, get others' opinions and more importantly review as a group how the Trust Clock is operating on a regular basis. We must not be afraid to make changes to how we operate the Trust Clock if there is a need to do so.

- Agile Working:
  Agile working means that individuals have the ability to work from home, and/or remote locations, subject to the leading principle being met. As a manager you need to ensure that GDPR and lone working requirements are met. Agile working is a choice and therefore ateb will not make any contributions towards electricity, phone or internet bills etc. If someone is working at home on a regular basis (at least once a week) or requests this, please refer to the Flexible and Agile Working Procedure and ask P&C Team for help as there are certain things we need to do i.e. risk assessment

From: Pete Cleary
To: Kate Houston
Subject: Introduction of the Trust Clock
Date: 13 January 2020 14:53:26

Statement of Pete Cleary
Brief
Trust Clock

On the 12 November 2019 at 13:00 I attended a briefing session delivered by Kate Houston about our future workplace.

After a consultation with staff, and as a part of the proposed future workplace, ateb were to introduce a new initiative called the "Trust Clock"

The brief given by Kate covered:

- The consultation process
- The agreed changes i.e. the introduction of the Trust Clock
- My responsibilities as a line manager
- Timeline for the introduction
- How it will be implemented
- Various scenarios to help me understand the concept and decision making
- Suggested yammer groups for line managers as a support group
- Questions and answer session at the end.

During the session Kate presented the brief is a very professional friendly and confident manner. She accepted questions and gave detailed and meaningful answers. I felt comfortable throughout brief and the knowledge I gained was very worthwhile.

Pete Cleary
Estates Coordinator

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Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

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From: Kate Houston
To: Victoria Evans
Subject: OFW
Date: 23 September 2019 15:59:11
Attachments: Change Plan V2.xlsx

Hi Tori

Further to our meeting I can confirm that due to holidays taken within the HR team over the half-term, documents being held at our solicitors for approval and many of the Role Profiles still outstanding with line-managers that my initial Change Plan needs to be amended with revised target dates set. I have therefore attached a second version for your consideration.

Please let me know if you feel these dates are practical and fit with your envisaged timescales.

Thanks.

Kate.

From: Victoria Evans
To: Kate Houston
Subject: RE: OFW
Date: 24 September 2019 16:16:46

Thanks Kate for flagging up these changes

Much appreciated

Tori

Victoria Evans
People and Communications Manager

Tel | 01437 763688
Meyler House, St. Thomas Green,
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From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Monday, September 23, 2019 15:59:11
To: Victoria Evans <Victoria.Evans@atebgroup.co.uk>
Subject: OFW

Hi Tori

Further to our meeting I can confirm that due to holidays taken within the HR team over the half-term, documents being held at our solicitors for approval and many of the Role Profiles still outstanding with line-managers that my initial Change Plan needs to be amended with revised target dates set. I have therefore attached a second version for your consideration.

Please let me know if you feel these dates are practical and fit with your envisaged timescales.

Thanks.

Kate.

From: Kate Houston
To: Victoria Evans
Subject: OFW
Date: 19 December 2019 09:59:56
Attachments: Change Plan V3.xlsx

Hi Tori

Further to our meeting today to catch-up on OFW I have attached the latest version of the Change Plan. I have highlighted dates that have been revised which are still outstanding such as briefing sessions on Yammer, implementing the Achieve Framework and utilising employee surveys in the future in order to monitor and measure success of the project. Jo and I will continue in the New Year to work towards these objectives.

Thanks.

Kate.

From: Victoria Evans
To: Kate Houston
Subject: Re: OFW
Date: 19 December 2019 13:03:56

Hi Kate
Many thanks for this and planning this big change
I appreciate you sorting out all the logistics and ensuring we engage everyone with the change
Tori

Get Outlook for iOS

From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Thursday, December 19, 2019 09:59:56
To: Victoria Evans <Victoria.Evans@atebgroup.co.uk>
Subject: OFW

Hi Tori

Further to our meeting today to catch-up on OFW I have attached the latest version of the Change Plan. I have highlighted dates that have been revised which are still outstanding such as briefing sessions on Yammer, implementing the Achieve Framework and utilising employee surveys in the future in order to monitor and measure success of the project. Jo and I will continue in the New Year to work towards these objectives.

Thanks.

Kate.

From: Lyndsey Dafoe
To: Kate Houston
Subject: RE: OFW
Date: 27 September 2019 13:54:01

Hi Kate,

We have been waiting for a couple of fixes to be carried out from WOL support and this should all be fixed ready for the end of November. (If not before)

I have booked out 3 days from my calendar, Monday 2nd December through to Wednesday 4th December where I will be carrying out training.

I think the approach of speaking to small groups of staff together is the best way forward and have arranged dates/times with departments.

If you can think of anything else, please let me know.

Regards,

Lyndsey Dafoe
Service Desk Analyst

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From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Friday, September 27, 2019 11:05:02
To: Lyndsey Dafoe <lyndsey.dafoe@atebgroup.co.uk>
Subject: OFW

Hi Lyndsey

Following our meeting regarding ICT responsibilities in connection to the Change Plan I prepared for the project and rolling out Our Future Workplace to key stakeholders please can you give me an update of when you will be able to brief staff on Whosonlocation?

This was originally set for October 18th but due to the project running behind, the new proposed date is the beginning of December.

Please let me know if this can be achieved within the agreed timescale and whether you expect any delays.

I have attached the newer version of the Change Plan for your information.

Many thanks.

Kate

From: Kate Houston
To: Kieron Ferry
Subject: RE: Our Future Workplace
Date: 25 November 2019 12:20:58

Hi Kieron
When you are in the office and have a spare half an hour please give me a ring and I will go through the Trust Clock with you.
Thanks.
Kate
-----Original Appointment-----
From: Kieron Ferry <Kieron.Ferry@atebgroup.co.uk>
Sent: 25 November 2019 12:18
To: Kate Houston
Subject: Declined: Our Future Workplace
When: 27 November 2019 11:00-12:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.
Where: Board Room Annex

From: Victoria Evans
To: Kate Houston
Date: 28 January 2020 10:39:16

Re: Witness Testimony in respect of Kate Houston's Management of Change portfolio.

Kate was asked to plan and develop a change plan to support the overview of the Our Future Workplace project. The change plan was instrumental to the delivery of the project and ensured we did not miss crucial steps that we had to undertake. Kate developed documents to support the change plan including a communications strategy and stakeholder plan; I understand Kate completed a Gantt chart to map her own timescales to deliver the project on time.

Kate measured the effectiveness of the project verbally, delivering important information and sharing updates and progress in structured team meetings with her lead teams, ensuring her teams understood the change and providing opportunities for her teams to raise queries or concerns. She would also e-mail individuals and teams with updates or update ad-hoc in person. She focused on regular communication and maintaining good working relationships throughout the process.

Kate would agree objectives in the change plan and made adaptations when necessary. For example, Kate was tasked with delivering Yammer training to the Group however, she informed me that she would not be able to achieve this within the agreed deadline due to the department workload and other priorities. We agreed that the Yammer training would be pushed back; she updated the change plan and informed the relevant people whilst updating her own Gantt Chart.

Kate kept me regularly informed and provided information when I requested including updated versions of the change plan and the completed Data Protection Impact Assessment. She liaised with key stakeholders including the Chief Executive; she communicated with him to discuss annual leave entitlement to agree a nominal amount to award to employees and when this would be communicated to employees.

Kate supported individuals, teams and direct colleagues throughout the project including supporting a new system implementation and supporting line managers and teams when the Trust Clock benefit was rolled out to teams. Alongside her colleague, she provided training sessions for the new system, which was crucial to the success of the project. I received positive feedback from line managers and individuals about Kate and the smooth delivery of the project.

The project was complicated with many different areas to plan and deliver, as a result, our department was under a considerable amount of pressure. However, Kate and the team managed this period of change well.

Victoria Evans
People and Communications Manager
Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP

OUR FUTURE WORKPLACE: Kate Houston's key duties Version 2

Task	09-Sep	16-Sep	23-Sep	07-Oct	14-Oct	21-Oct	28-Oct	04-Nov	11-Nov	18-Nov	25-Nov	02-Dec	09-Dec	16-Dec	23-Dec	30-Dec
Amend and check Role Profiles for all employees																
Send out Main Terms, Role Profiles and generic letter regarding consultation and changes																
Complete a GDPR risk assessment																
Purchase BreatheHR																
Calculate annual leave entitlement from 1st December to 31st December																
Set up new responsibility rights for line-managers and supervisors for their teams																
Set-up BreatheHR with your departments teams																
Provide BreatheHR training to teams																
Brief line-managers, supervisors re: Role Profiles, DNA, leadership, service delivery and hubs and Trust Clock																
Brief teams re: Role Profiles, DNA, leadership, service delivery and hubs and Trust Clock																
Brief workforce on Yammer how it operates and its benefits																

EV. 40

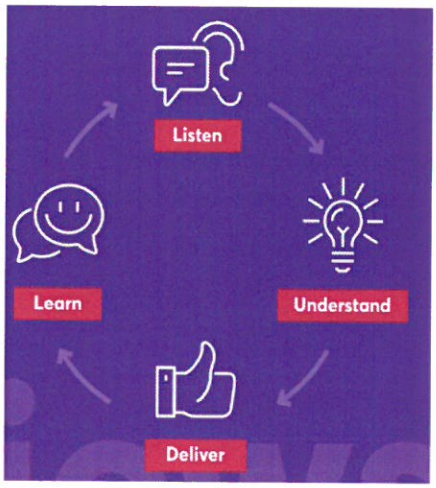
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Our Future Workplace

Line Managers Briefing

ateb better living solutions

The project launch is not the end…..it's the start



- Learn – could we have done things differently?
- Listen – speak to our staff(our customers) what do they think?
- Understand – what is the feedback telling us? Do staff need more information?
- Deliver – show that we have listened and learnt – have we tweaked process or provided more information?
- Repeat the process!

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Key point of reference throughout all of this is....



ateb better living solutions

How do we support Our Future Workplace?

A line manager is "...a person responsible for controlling or administering part of an organisations function and/or group of employees"

It is all our responsibilities to:

- Take responsibility for our team – are they safe?
- Develop our team – i2i, coaching, mentoring, training
- Undertake employee admin – agree leave, return to work interviews, etc
- Manage performance – employee/team performance, monitoring, reporting and improving
- Manage assurance – setting, delivering and controlling cost, quality, time and risk
- Communicate – ensure key messages are shared and understood by our teams
- Support – ensuring support is available to sustain the wellbeing of our teams

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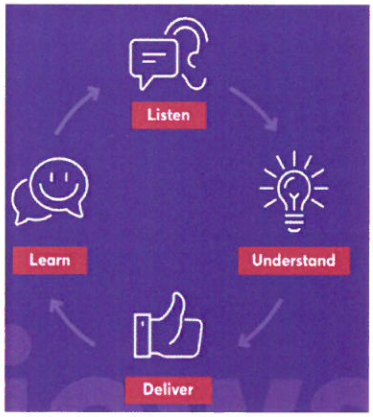
Our Future Workplace

Line Managers Briefing

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This is to brief you on OFW, line-managers have already been briefed. You can go to your ling-manager or HR with any queries at any time.

The project launch is not the end…..it's the start



- Learn – could we have done things differently?
- Listen – speak to our staff(our customers) what do they think?
- Understand – what is the feedback telling us? Do staff need more information?
- Deliver – show that we have listened and learnt – have we tweaked process or provided more information?
- Repeat the process!

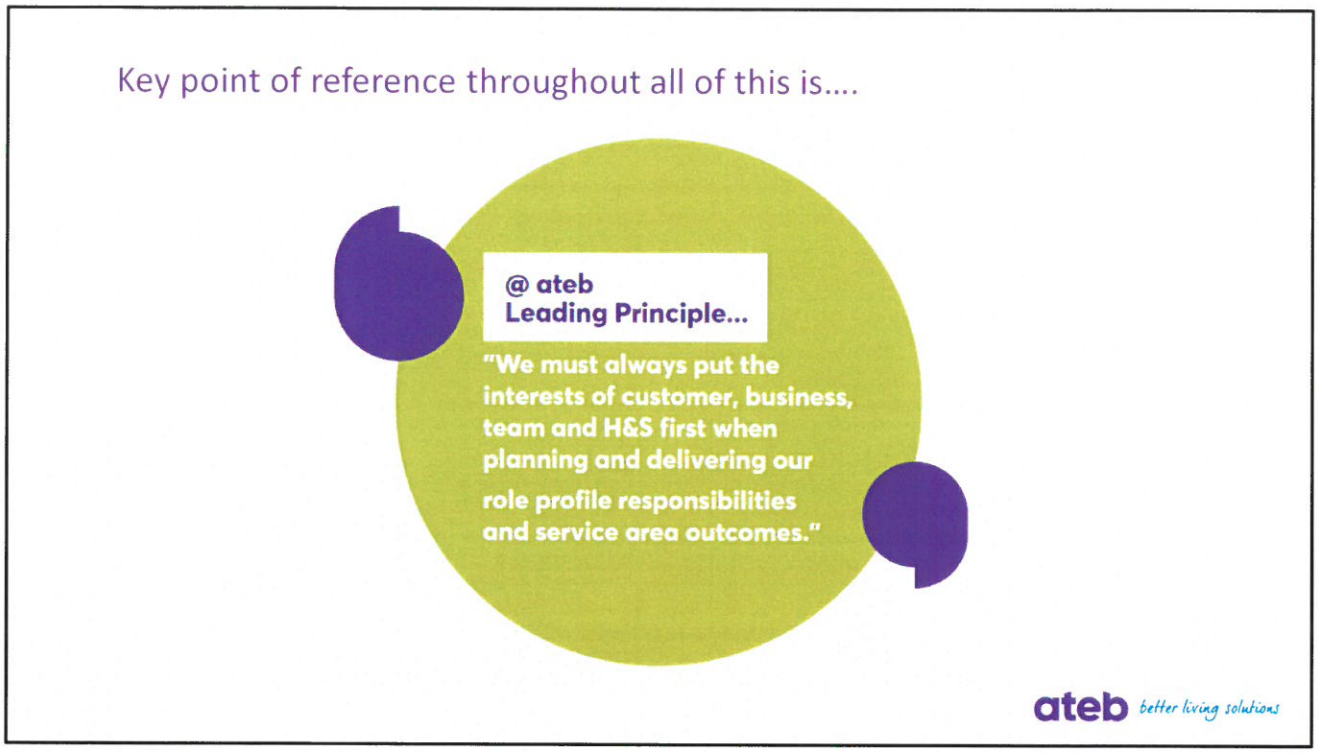
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It is important to note that our OFW is not the end …it's the start.

We want to continually receive feedback **by listening, understanding, delivering and learn** throughout this process and based on your comments we may make modifications as we go along. We will be taking a flexible approach adapting when we need to as this is part of DNA.

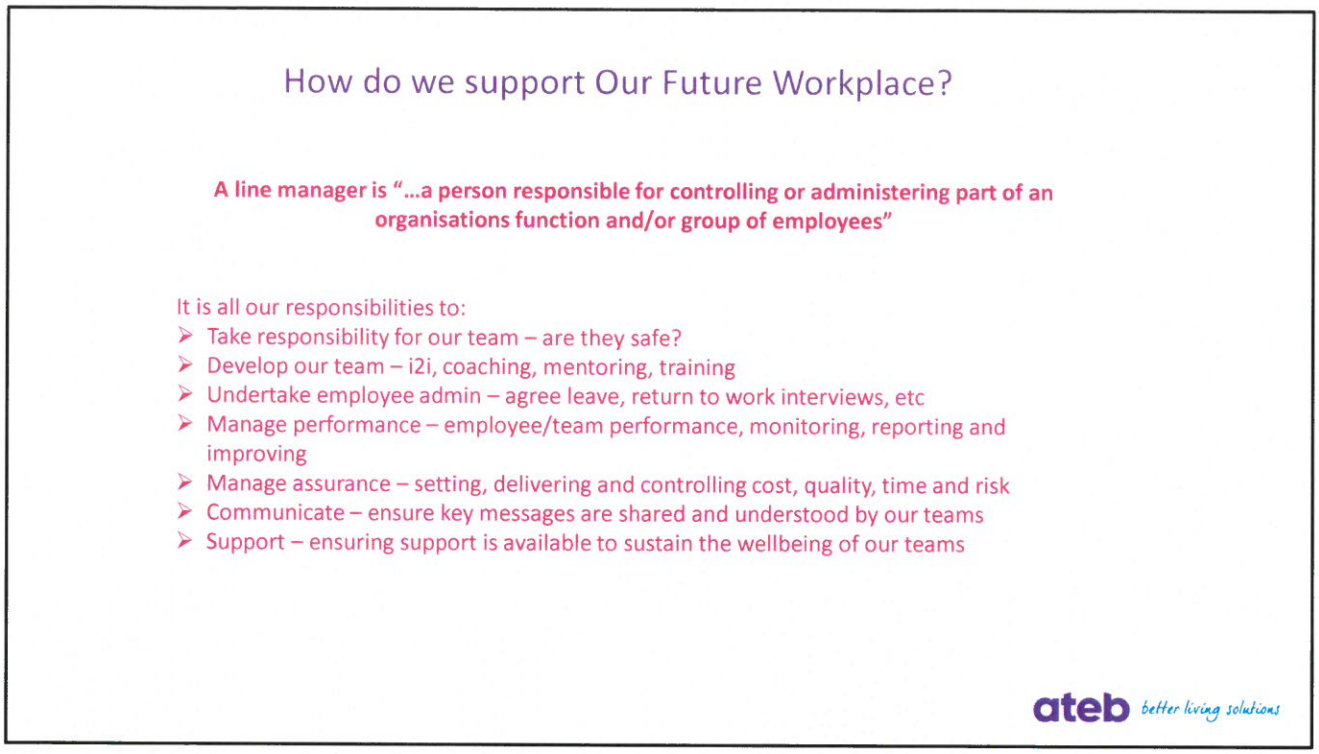
As this is a learning process we have asked all line-managers to join a managers yammer chat group. This is area where they can check what has been approved before or collaboratively agree on norms of the day to day operation of OFW.

DEADLINE is the 15th November for returning documents reminder letters will follow.

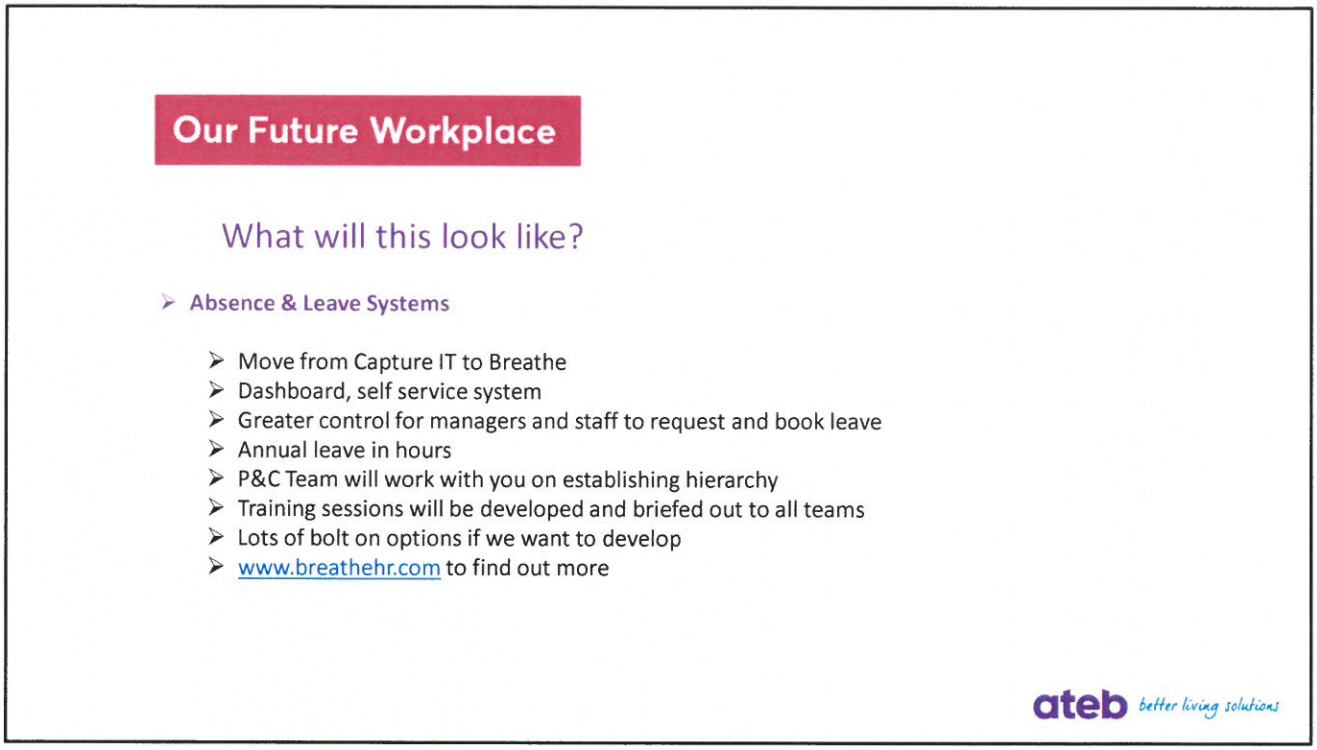


When requesting something you must bear in mind our leading principle.

When decisions are made it is with the leading principle in mind.



This is major change to how the Group operates leading with trust, agile working and really good terms and conditions. We all have to take ownership and be accountable of our responsibilities and outcomes.



CaptureIT will be used till the year end December.

Flexible working will stop end of November and the trust clock begins December onwards.

Breathe will be implemented which is a web based absence management system. It is self-service where you can upload next of kin details, personal details, book absences such as holidays and it is easy to use with a dashboard showing your balances. It will be managed by your line-manager and annual leave can be booked in hours if you want. This is a more streamlined system than you are currently using as before you submit a request for leave you can see if any one in your team is off.

Breathe can be downloaded on your laptop, mobile or iPad.

There will be training on the system before it goes live.

From: Kate Allen
To: Kate Houston
Subject: Our Future Workplace
Date: 24 January 2020 10:43:51

Kate updated myself and my colleagues in the Finance Team with the new 'Our Future Workplace' terms and conditions.
This consisted of a briefing on the new 'trust clock' which was new to all staff, changes to Role Profiles and changes to our Main Terms and Conditions.
Kate explained to us why, when and how these changes will be implemented, and gave relevant examples which helped explain more clearly, especially to relatively new members of staff. Examples given showed staff how the new systems were envisaged to work and what the parameters were to ensure flexibility amongst staff whilst providing the excellent customer service the organisation seeks to provide.

I asked a question regarding the parameters of 'Special Leave' and payment during this time. Kate was unsure of my specific question but made a note to ask her Manager and later that day Kate provided me with the answer to my query.

The briefing was carried out in a professional and courteous manner with opportunity to ask questions and to clarify issues.

Please don't hesitate to contact me should you need further information.

Kind regards

Kate Allen
Accountant (Financial)

Tel | 01437 763688
Meyler House, St. Thomas Green,
Haverfordwest, Pembrokeshire, SA61 1QP
atebgroup.co.uk

From: Suzanne Hobday
To: Kate Houston
Subject: CIPD Evidence
Date: 14 January 2020 14:17:47

Hi Kate,

Further to our discussion today I can confirm the following:

You arranged a meeting with the Finance Team following the formal consultation that took place in relation to Our Future Workplace during which you briefed us on the proposed changes. These included the Trust Clock, the new HR System BreatheHR, the changes being made to our Main Terms of Employment and the introduction of Role Profiles which replaced the previous Job Descriptions. During this meeting you highlighted all the changes being made and answered the questions and queries we had.

When I checked the employee documentation that I needed to sign I noticed that my Role Profile had not been updated with key information that had been agreed with the Finance Manager, my line manager. I informed you of this and you updated the documentation after liaising with the Finance & HR Managers. You then sent me the revised correct documentation which enabled me to sign it for completion.

Suzanne

Suzanne Hobday
Finance Officer

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Audrey Filer

To: Kate Houston
Subject: Towards CIPD qualification

To whom it may concern

After recent training on BreatheHR software which enables staff to be more proactive recording their own absences, e.g annual leave, then for approval with a line-manager. I found a problem with booking my leave, initially, on BreatheHR after totalling the hours and realised assistance was needed to amend the booking to a half-day due to an impending meeting on the first day of my leave. Kate showed me the correct procedure and although deleting the whole day/absence period and re-booking the holiday appeared easy, it transpired I had to wait for the line-manager to approve the cancellation before booking the intended annual leave. Kate was very helpful in giving me a refresher around BreatheHR to restore my confidence in future use of the software.

Kate was also very helpful towards other colleagues, again on BreatheHR, with updating next of kin, booking leave and special leave in giving them individual sessions if they had been unable to attend the original briefing session given by Kate and her colleague.

Audrey 

Audrey Filer • **Adaptations Co-ordinator**
audrey.filer@wwcr.co.uk
Gofal a Thrwshio Gorllewin Cymru
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From: Linzi Laugharne
To: Kate Houston
Subject: Our Future Workplace
Date: 03 February 2020 11:44:53
Attachments: image002.png

Our Future Workplace

Our Future Workplace is part of ateb's 'vision' and the trust clock which is a new way of working which has been greatly received by employees. There is general positivity on the way people are being trusted more and they feel like there is much more flexibility. I have definitely seen a motivation increase in my team even though they are in a service area that requires standard office hours as phones / emails need to be covered whilst the office open.

As a Line Manager special leave is an added benefit that has been implemented. I have recently been asked to create a Microsoft teams group for the Line Managers to be able to discuss special leave requests and any trust clock issues that may arise, (No personal information is shared) only the nature of the request. This helps the Line Manager team collaboratively look at different special leave requests and give each other support and guidance on the types of requests and the time scales we believe to be acceptable.

The People team offered Line Manager drop in sessions to discuss and support special leave requests / trust clock problems which were very helpful and a good benefit to the Line Managers.

I have not seen any negativity towards the trust clock or special leave or any other parts of 'Our Future Workplace'.

Laugharne.

Linzi Laugharne
Maintenance and Compliance Coordinator

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ROLE PROFILES –

DOUBLE CHECK JOB TITLES OF ROLE PROFILE AND REPORT TO/FROM INCLUDING ANY JOB TITLES REFERENCED IN THE TEXT

Ref	Job Title	Team	Date last updated	Complete	New Format	PLACE OF WORK	Place of work option	Car Option	Subscription Option
RP/01/1	Board Member	Board	28/10/19	Y	Y	Y	N/A	N/A	N/A
RP/02/1	Chief Executive	Exec	28/10/19	Y	Y	Y	N/A	N/A	N/A
RP/03/1	Executive Director – Customer	Exec	28/10/19	Y	Y	Y	N/A	N/A	N/A
RP/03/2	Executive Director – Finance	Exec	28/10/19	Y	Y	Y	N/A	N/A	N/A
RP/03/3	Executive Director - Property	Exec	28/10/19	Y	Y	Y	N/A	N/A	N/A
RP/04/1	People & Communications Manager	People & Comms	28/10/19	Y	Y	MEYLER	A	B	Y
RP/04/2	H&S and Regulation Manager	Governance	28/10/19	Y	Y	MEYLER	B	A	Y

RP/04/3	Company Solicitor	Governance	28/10/19	Y	Y	MEYLER	A	B	Y
RP/04/4	Customer Services Manager	Customer Services	28/10/19	Y	Y	MEYLER	A	B	Y
RP/04/5	Customer Support Manager	Customer Services	28/10/19	Y	Y	MEYLER	B	A	Y
RP/04/6	Property Services Manager	Property Services	28/10/19	Y	Y	MEYLER	B	A	Y
RP/04/7	Maintenance & Compliance Manager	Customer Services	28/10/19	Y	Y	MEYLER	A	A	Y
RP/04/8	Finance Manager	Finance & ICT	28/10/19	Y	Y	MEYLER	A	B	Y
RP/04/9	Procurement Manager	Finance & ICT	28/10/19	Y	Y	MEYLER	A	B	Y
RP/04/10	ICT & Performance Manager	Finance & ICT	28/10/19	Y	Y	MEYLER	A	B	Y
RP/04/11	Agency Manager	WWC&R	28/10/19	Y	Y	MEYLER	B + CEREDIGION	A	Y
RP/04/12	Operations Manager	MBH	28/10/19	Y	Y	MEYLER	B+ CEREDIGION	C	Y
RP/05/1	Money Solutions Team Leader	Customer Services	29/10/19	Y	Y	MEYLER	B	A	N

RP/05/2	Mechanical & Electrical Supervisor	Maintenance & Compliance	29/10/19	Y	Y	MEYLER	B	C	N
RP/05/3	Digital Support Coordinator	Customer Services	29/10/19	Y	Y	MEYLER	B	C	N
RP/05/4	Finance Officer (Payroll & Treasury)	Finance & ICT	29/10/19	Y	Y	MEYLER	A	B	Y
RP/05/5	Blank								
RP/05/6	Property Services Officer	Property Services	29/10/19	Y	Y	MEYLER	A	A	N
RP/05/7	Development Officer	Property Services	29/10/19	Y	Y	MEYLER	B	A	N
RP/05/8	Customer Services Coordinator	Customer Services	29/10/19	Y	Y	MEYLER	A	B	N
RP/5/9	Senior Scheme Manager	Extra Care Scheme	29/10/19	Y	Y	DEPENDS ON PERSON	B	A	N
RP/5/10	Maintenance Supervisor (Voids/Repairs)	Maintenance & Compliance	29/10/19	Y	Y	MEYLER	B	C	N
RP/5/11	Senior Technical Officer	WWC&R	29/10/19	Y	Y	MEYLER	B + CEREDIGION	A	N
RP/5/12	Land & Construction Manager	MBH	29/10/19	Y	Y	MEYLER	B + CEREDIGION	C FROM TEMPLATE 4	N

From: Julie John
To: Kate Houston
Subject: Data Protection Impact Assessment (DPIA)
Date: 04 February 2020 09:57:41

Hi Kate

Please find below my statement for your creation of a Data Protection Impact Assessment for the Breathe HR system.

I assisted Kate with producing a Data Protection Impact Assessment this was a new process for ateb with the introduction of GDPR. Previously, only one other DPIA had been completed. I sat with Kate showing her the DPIA template and advising the level of detail required. Kate then completed the DPIA on her own, although I was there to assist with any queries. Kate provided her final draft to me for appraisal before submitting it to my manager, the DPO, for approval and sign off.

Kate then filed the authorised Data Protection Impact Assessment in the appropriate file for future reference according to ateb's organisational requirement. Kate is aware that the document will need review and may require updates should any process detailed in the document change.

Julie John
Governance Coordinator

Tel | 01437 763688
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, rhowch 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.

Please help me to improve Our Future Workplace - your feedback is valuable to me.

Please complete the survey based on your experience to date.

I welcome feedback of your entire experience from consultation, implementation to how the processes have been embedded so far.

* 1. Do you think the transition from consultation to implementing the changes relating to Our Future Workplace was completed in a timely manner?

- Yes
- No - please explain why and what ateb can do to improve our processes in the future?

* 2. Please rate the response rate to any questions you raised and how speedily they were answered throughout the process on a scale of 1-5 (1 = Poor, 5 = Excellent)

* 3. Do you think that there was collective buy-in for the project from all levels at ateb relating to Our Future Workplace?

- Yes
- No - please explain why?

* 4. Do you like the new systems?

- Yes
- No - please explain why?

* 5. Do you think Our Future Workplace, primarily the Trust Clock offers agility and a better working environment?

- Yes
- No - please explain why?

* 6. Do you feel Our Future Workplace offers competitive benefits?

- Yes
- No - please explain why?

* 7. Do you think there is any potential for risks associated with the Trust Clock?

- ( ) Yes - please explain what risks could occur?
- ( ) No

* 8. Have you requested any special leave using BreatheHR, if so, was it granted?

- ( ) Yes
- ( ) No - for what reason?

* 9. Please rate how easy it was to book an absence such as annual leave or special leave on BreatheHR on a scale of 1-5 (1 = Very Difficult, 5 = Easy)

* 10. Please rate the information you were provided throughout the process such as correspondence, updated documentation, briefing sessions to supporting materials on operating systems. Please rate on a scale of 1-5 (1 = Poor/Not informative, 5 = Excellent/Very informative)

* 11. Please rate how easy it was to use WhosOnLocation on a scale of 1-5 (1 = Very Difficult, 5 = Easy)

12. Would you like anything done differently?

13. Overall, how would you rate Our Future Workplace?

- Excellent
- Very good
- Good
- Fair
- Poor

Thank you for completing the survey which will help me complete my studies and monitor success of Our Future Workplace.

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- No - please explain why?

* 6. Do you feel Our Future Workplace offers competitive benefits?

- Yes
- No - please explain why?

* 7. Do you think there is any potential for risks associated with the Trust Clock?

- Yes - please explain what risks could occur?
- No

* 8. Have you requested any special leave using BreatheHR, if so, was it granted?

- Yes
- No - for what reason?

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* 11. Please rate how easy it was to use WhosOnLocation on a scale of 1-5 (1 = Very Difficult, 5 = Easy)

12. Would you like anything done differently?

13. Overall, how would you rate Our Future Workplace?

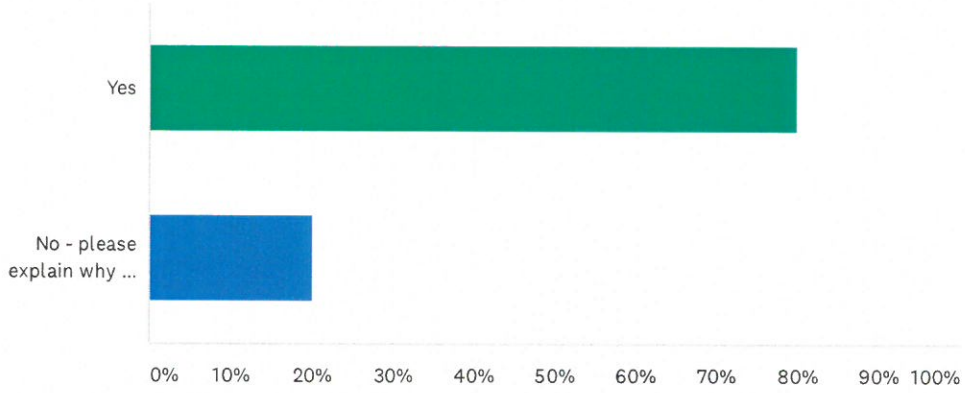
- Excellent
- Very good
- Good
- Fair
- Poor

Thank you for completing the survey which will help me complete my studies and monitor success of Our Future Workplace.

EV. 49

Q1 Do you think the transition from consultation to implementing the changes relating to Our Future Workplace was completed in a timely manner?

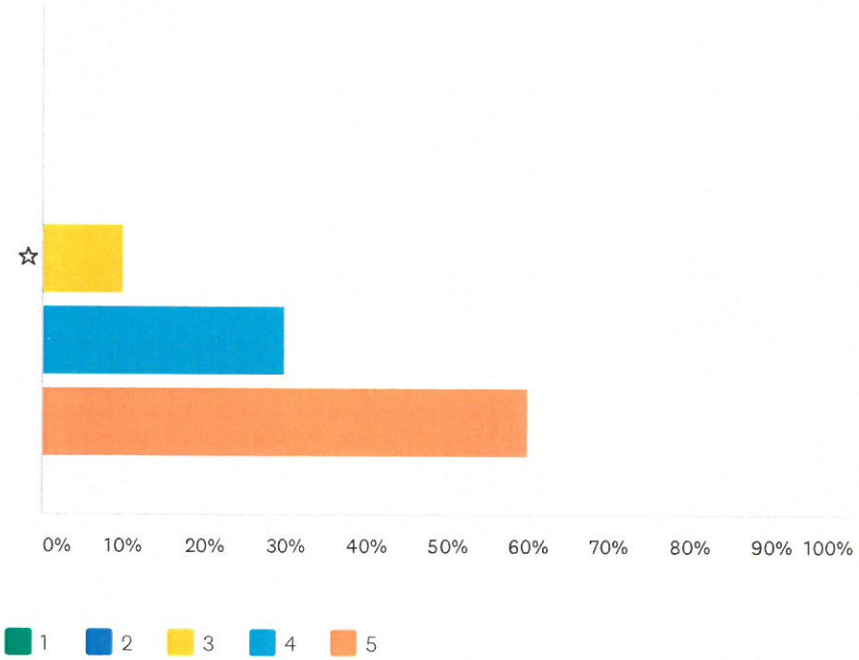
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	80.00%	8
No - please explain why and what ateb can do to improve our processes in the future?	20.00%	2
TOTAL		10

Q2 Please rate the response rate to any questions you raised and how speedily they were answered throughout the process on a scale of 1-5 (1 = Poor, 5 = Excellent)

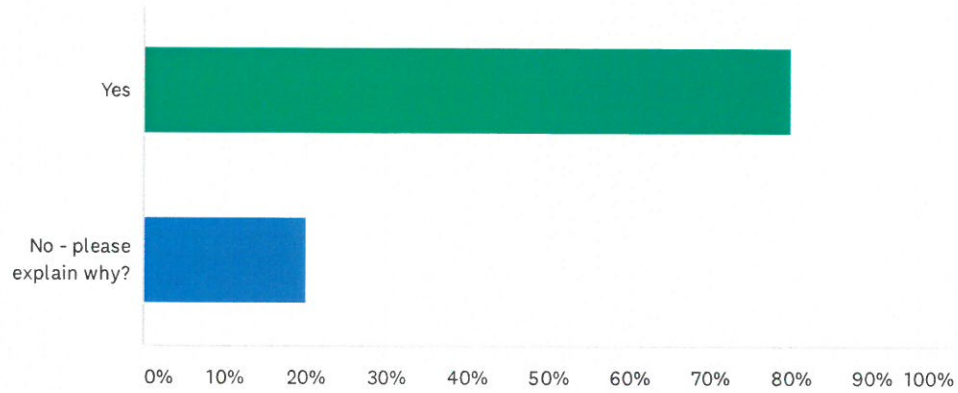
Answered: 10 Skipped: 0



	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	10.00% 1	30.00% 3	60.00% 6	10	4.50

Q3 Do you think that there was collective buy-in for the project from all levels at ateb relating to Our Future Workplace?

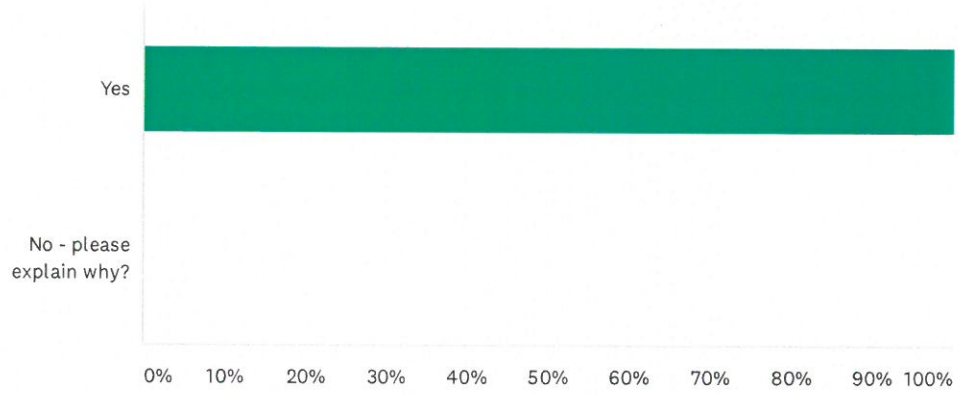
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	80.00%	8
No - please explain why?	20.00%	2
TOTAL		10

Q4 Do you like the new systems?

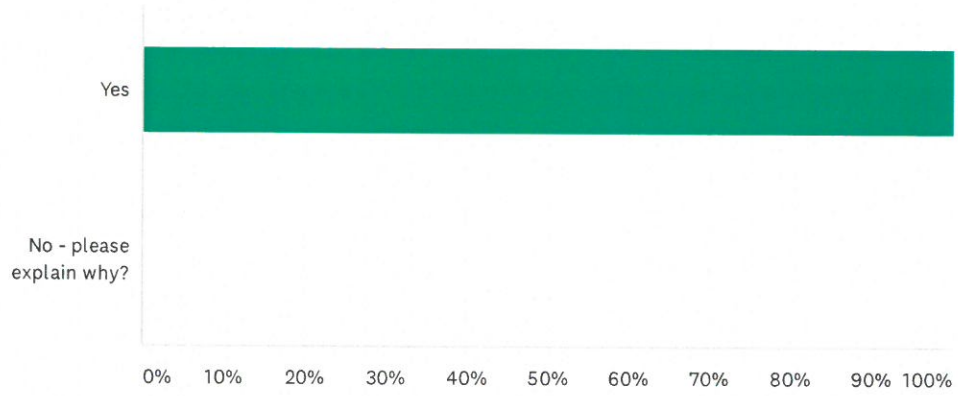
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	10
No - please explain why?	0.00%	0
TOTAL		10

Q5 Do you think Our Future Workplace, primarily the Trust Clock offers agility and a better working environment?

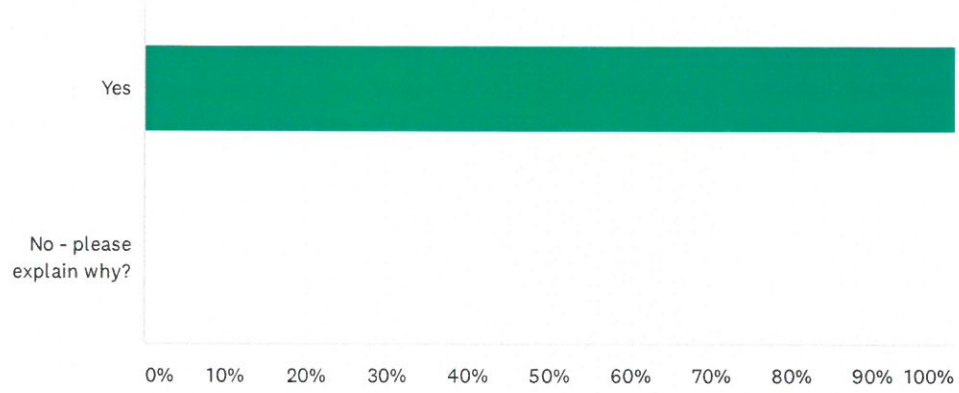
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	10
No - please explain why?	0.00%	0
TOTAL		10

Q6 Do you feel Our Future Workplace offers competitive benefits?

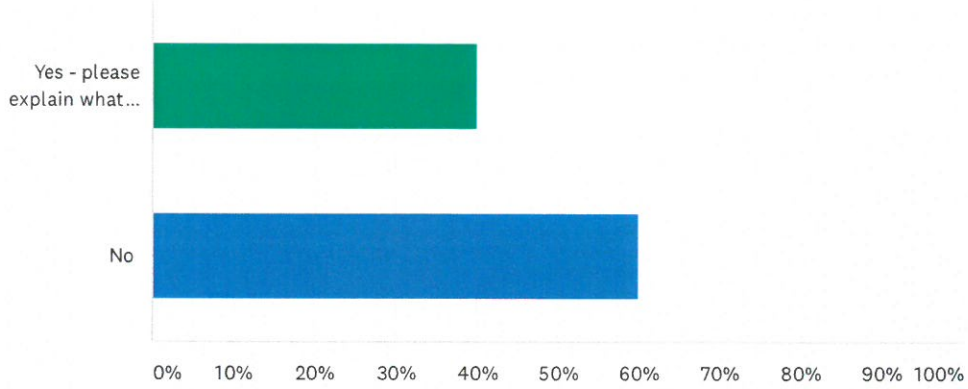
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	10
No - please explain why?	0.00%	0
TOTAL		10

Q7 Do you think there is any potential for risks associated with the Trust Clock?

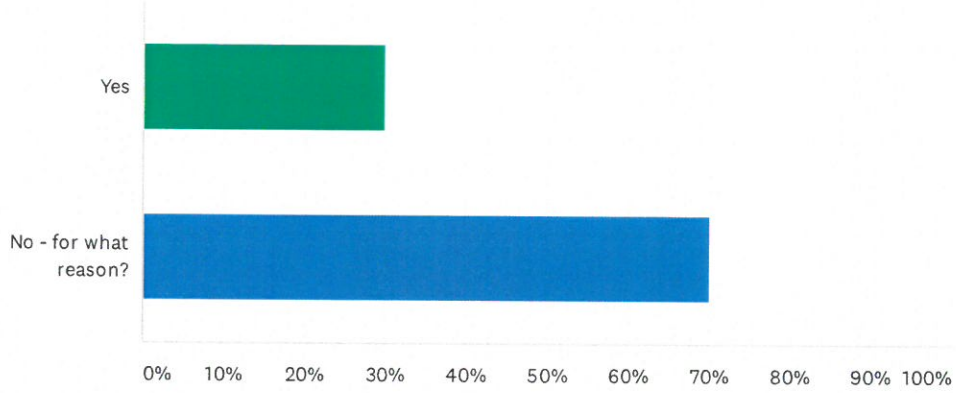
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes - please explain what risks could occur?	40.00%	4
No	60.00%	6
TOTAL		10

Q8 Have you requested any special leave using BreatheHR, if so, was it granted?

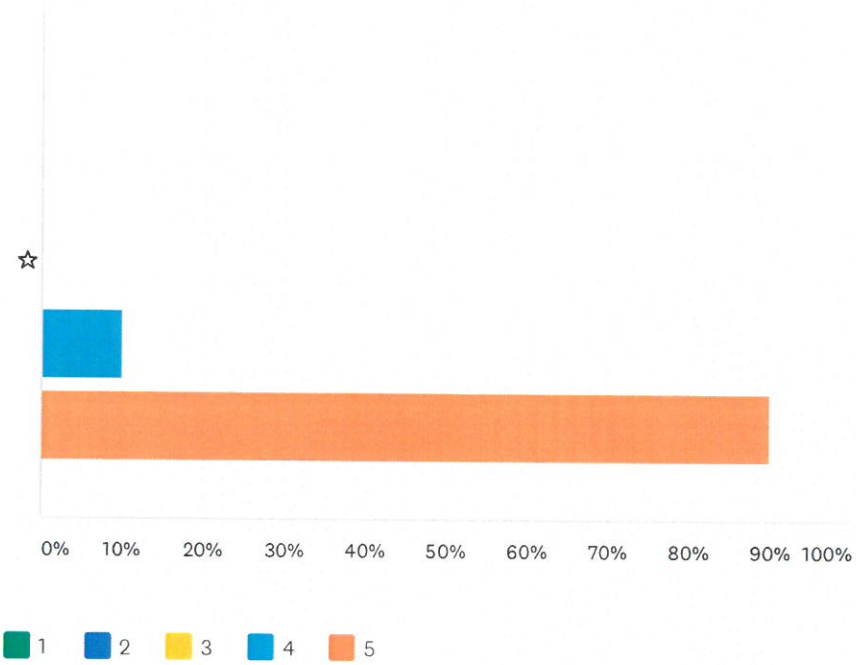
Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	30.00%	3
No - for what reason?	70.00%	7
TOTAL		10

Q9 Please rate how easy it was to book an absence such as annual leave or special leave on BreatheHR on a scale of 1-5 (1 = Very Difficult, 5 = Easy)

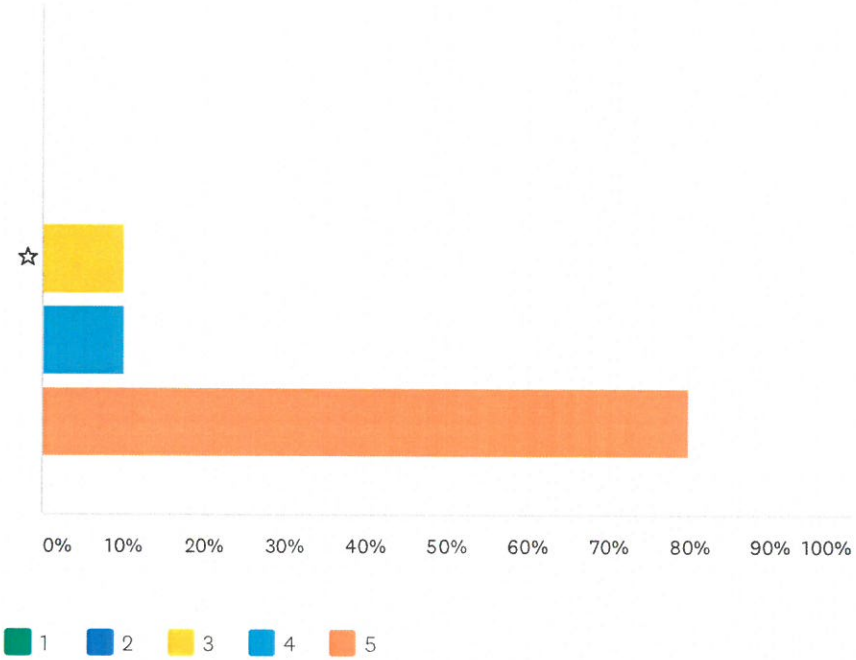
Answered: 10 Skipped: 0



	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	10.00% 1	90.00% 9	10	4.90

Q10 Please rate the information you were provided throughout the process such as correspondence, updated documentation, briefing sessions to supporting materials on operating systems. Please rate on a scale of 1-5 (1 = Poor/Not informative, 5 = Excellent/Very informative)

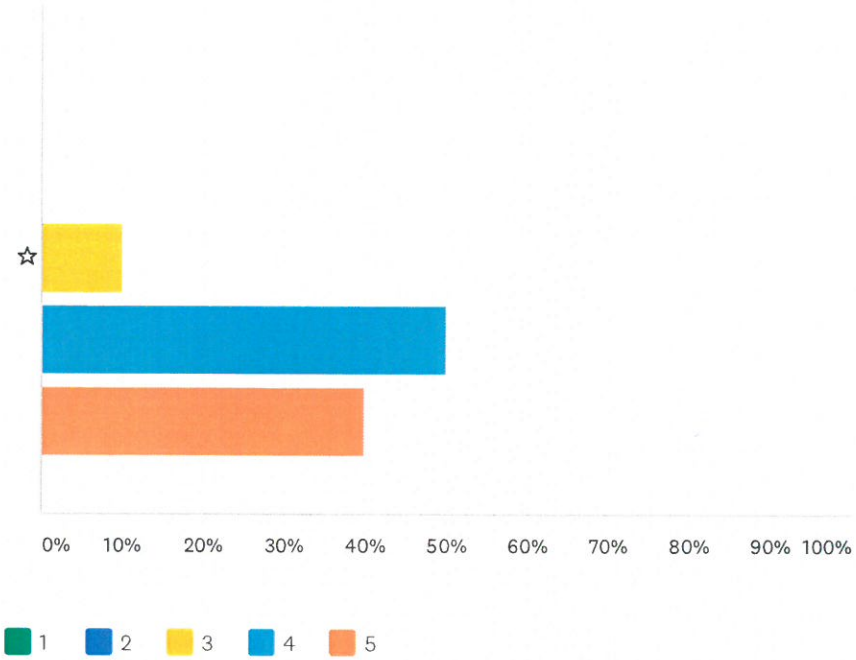
Answered: 10 Skipped: 0



	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	10.00% 1	10.00% 1	80.00% 8	10	4.70

Q11 Please rate how easy it was to use WhosOnLocation on a scale of 1-5 (1 = Very Difficult, 5 = Easy)

Answered: 10 Skipped: 0



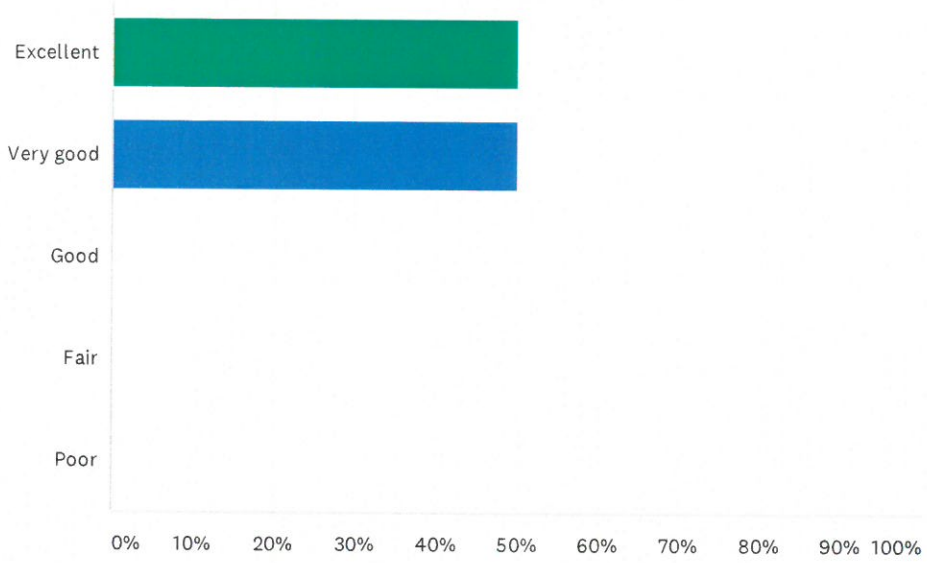
	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	10.00% 1	50.00% 5	40.00% 4	10	4.30

Q12 Would you like anything done differently?

Answered: 7 Skipped: 3

Q13 Overall, how would you rate Our Future Workplace?

Answered: 10 Skipped: 0



ANSWER CHOICES	RESPONSES	
Excellent	50.00%	5
Very good	50.00%	5
Good	0.00%	0
Fair	0.00%	0
Poor	0.00%	0
TOTAL		10

From: Poppy Kucyj
To: Kate Houston
Subject: RE: OFW
Date: 24 January 2020 14:18:20

Hi Kate,

Yes no problem, will keep this information circulating using Yammer whilst linking it to our DNA.

Poppy Kucyj
Communications Assistant

Tel | 01437 763688
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, rhowch 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.

From: Kate Houston <Kate.Houston@atebgroup.co.uk>
Sent: Friday, January 24, 2020 11:03:22
To: Poppy Kucyj <poppy.kucyj@atebgroup.co.uk>
Subject: OFW

Hi Poppy

Following our People & Comms Meeting and discussions with regard to OFW please could you focus communication on:-

The positivity surrounding it by supervisors and employees alike.

Going forward focus on data that our team gathers like how easy the systems are to use, whether employees are benefiting from special leave and success stories etc ... and reflecting this back to our DNA whenever possible.

Thanks

Kate

Development plan

NAME:	Kate Houston	**MEMBERSHIP NUMBER:**	49777067
COVERING THE PERIOD FROM:	January 2020	TO:	May 2020

Planned outcome

Using the CIPD Professional Map 20013: **To be an active key stakeholder relating to change management: encouraging employee engagement; to be a decisive thinker; and to be curious** (CIPD, ND)

What do I want/need to learn?	What will I do to achieve this?	What resources or support will I need?	What will my success criteria be?	Target dates for review and completion
In order to broaden my expertise, knowledge and skills set in the behaviour of Employee Engagement (CIPD, ND):- • To involve all employees with regard to change by encouraging their contribution via: feedback; focus groups or an active member of the project. • To use technology like apps or surveys to gauge feedback.	• Become proficient in creating and designing surveys. • Email employee to come along and be part of focus groups. • Become proficient in analysing data.	• Find free ways of surveying employees. • Gauge what other Housing Associations are using to gauge employee engagement. • Actively encourage employees to assist.	• Increasing numbers at focus groups. • Increasing number of employees responding to surveys and such like. • Reporting this key data to my Manager and other stakeholders, when appropriate.	• To review progression on an **on-going** basis. • End of **May 2020** to reflect what projects I have been involved with to date. Have I listened to feedback and adjusted measure accordingly and whether I have involved others fully in the process.

In order to broaden my expertise, knowledge and skills set in the behaviour of Decisive Thinker (CIPD, ND):- • Continually request feedback on own performance and that of the overall project. • Continually inform the wider teams at Ateb on performance data and organisational performance relating to change projects. • Learn from this feedback to ensure I improve skill-set. • Continually challenge decisions	• Critically analyse performance; could consultants or specialist be used. • Adapting behaviour and practical skills to achieve better results if required. • Always question. • Be better at producing data to assist with reflection.	• Gather data using Survey Monkey more often. • Hold more focus groups encouraging employee engagement – this is useful to gather feedback and be reflective.	• How often I participate in change projects. • How often I hold focus groups. • How many employees contribute to employee engagement groups. • How much information I share to employees about success and failures regarding projects.	• To review progression on an **on-going** basis. • End of **May 2020** to reflect what I have managed to achieve, if my abilities and skill-level increase with regard to feedback, reflections and communicating these.
In order to broaden my expertise, knowledge and skills set in the behaviour of Curious (CIPD, ND):- • It is critical to understand other organisations' in order to learn and adapt at Ateb to ensure Ateb continues to competitive and to be change-ready.	• Continue to look beyond Ateb at other organisations' regardless of sector searching for best practice and innovative ideas.	• Ensure active use of social media platforms like LinkedIn and Yammer. • Keep up-to-date with People Management magazine. • Establish working groups with other Housing Associations. • Ensure I actively engage in Ateb's own focus groups when able.	• Being an active member in change at Ateb. • Whenever possible be a key stakeholder and project lead in change projects at Ateb.	• To review progression on an **on-going** basis. • End of **May 2020** to reflect what I have managed to achieve, if my abilities and skill-level has increased in change management.

Please help me to evaluate my performance - your feedback is valuable to me.

Please complete the survey based on your recent experience of Our Future Workplace and implementing the Trust Clock and BreatheHR

* 1. When I briefed you, did I brief you well regarding the changes which were going to be implemented?

- Yes
- No - please explain why and what we can do to improve our process.

* 2. Did you have any questions, if so, did I answer them fully?

- Yes
- No - please explain why and what we can do to improve our process.

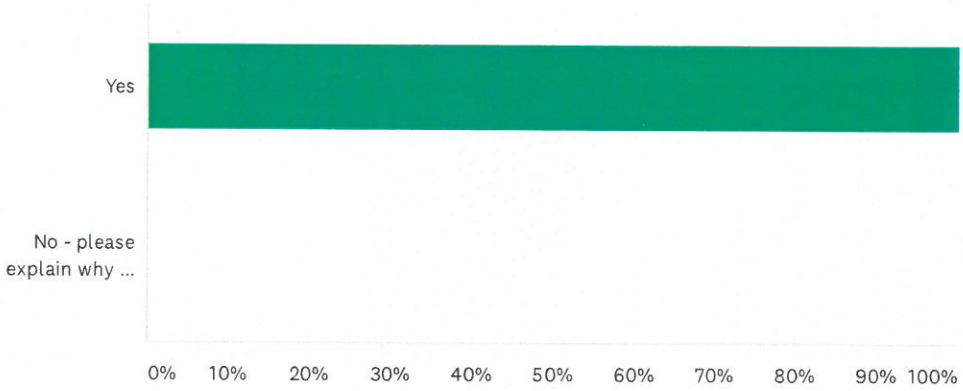
3. Overall, how would you rate the content I gave?

- Excellent
- Very good
- Good
- Fair
- Poor

Thank you for completing the survey which will help me to improve our processes.

Q1 When I briefed you, did I brief you well regarding the changes which were going to be implemented?

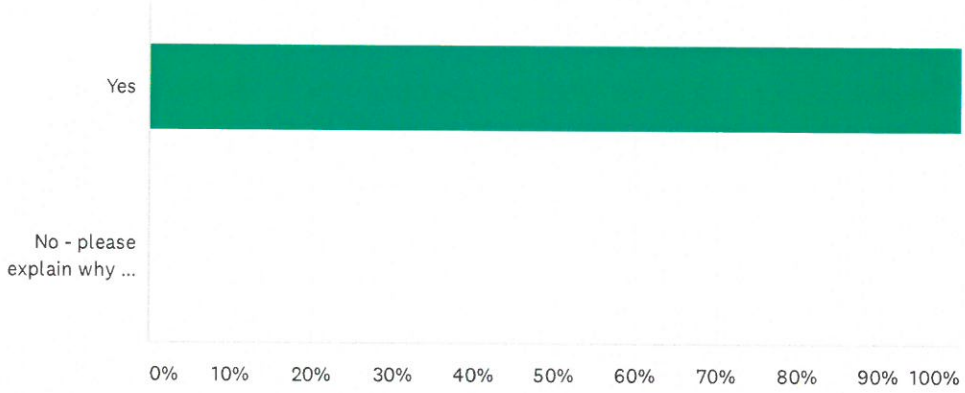
Answered: 12 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	12
No - please explain why and what we can do to improve our process.	0.00%	0
TOTAL		12

Q2 Did you have any questions, if so, did I answer them fully?

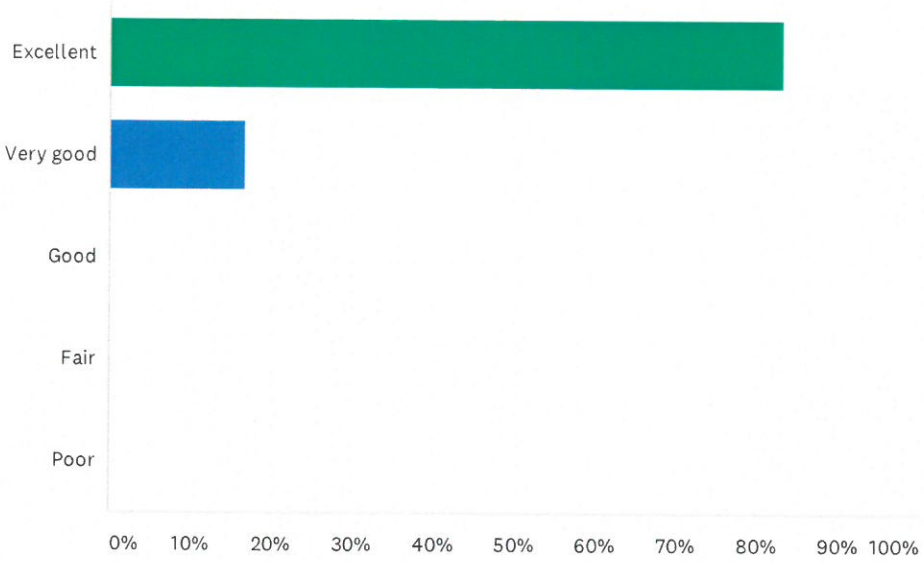
Answered: 12 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	12
No - please explain why and what we can do to improve our process.	0.00%	0
TOTAL		12

Q3 Overall, how would you rate the content I gave?

Answered: 12 Skipped: 0



ANSWER CHOICES	RESPONSES	
Excellent	83.33%	10
Very good	16.67%	2
Good	0.00%	0
Fair	0.00%	0
Poor	0.00%	0
TOTAL		12

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