

Qualification:

CIPD Diploma in Applied Human Resources

Module Name:

Contributing to Resourcing and Talent Planning in the Organisation

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

Signed: 

Kate Houston

Date:

3rd June 2020

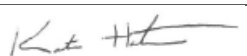
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Qualification title: Contributing to Resourcing and Talent Planning in the Organisation				Unique Learner No. (ULN): 1403228	
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Candidate declaration:					
• I confirm that the work/evidence presented 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:	3rd June 2020

LO1.

Ateb's workforce and talent planning

Ateb has generalised HR roles our scope is wide like; employer branding, creating people policies and procedures, robust recruitment and selection practices and performance management outsourcing external support via consultants and solicitors.

Ateb attracts talent using its organisational position and employer branding: -

Ateb's Vision (EV1) potential recruits can assess culture, values and vision; who we are, expectations, characteristics, competencies and attributes for roles and leadership.

Role Profiles define characteristics and competency-based attributes (EV2).

Our Future Workplace (OFW) details comprehensive benefits, pay, social entity and flexible working practices resulting from an ever-changing environment (Taylor and Woodhams, 2016), (EV3).

Various **social media platforms** and the corporate website (EV4).

CIPD (2018); Taylor (2019); Wilkinson and Taylor (2016) reflect the importance of having the right skills, at the right time in the right places linked to organisational strategic objectives; the People Team forecast over a three-year period focusing on attracting and retaining talent within the Service Area Improvement Framework 2018-2021 (EV5).

The People & Communication Manager assists Executive Management Team (EMT) and Managers with workforce planning facilitating the process. Hirsh (ND) reflects accountability should be with leaders and managers with HR working in partnership. EMT and Managers lead; considering objectives and strategies aligned to Ateb's DNA (EV6).

Taylor and Woodhams (2016) state organisations' activities consider specific employees and skills needed for the future. Ateb's approach is informally achieved for existing vacancies by managerial assumptions and personal judgements whereas (EV 7), initiating new job roles or re-structures whilst managerial assumptions are a driving force the approach is formal including systematic techniques, costing, benchmarking, laws, and regulations and working back from costs creating a business case (EV8; 9). The process depends on Manager and EMT requirements as there are no prescribed policies, guidance and documentation and internal information is limited (EV10). Proposals are presented to Board for consideration and approval (EV11; 12).

Ateb operates a Service Delivery Plan detailing how we deliver a great service using resources available both internally and externally, how we manage risk and continue to improve and grow; hubs manage operations quarterly ensuring effectiveness like recruitment which the Board integrate their strategic assurance and performance responsibilities (EV13).

Ateb does not succession plan, this was evident with the Finance Director retiring unexpectedly. The shift of duties like budgeting and forecasting; a skill which the Director held transferred to two understudies. Both had the right skill-sets, organisational knowledge expected to fill at short-notice which until now this critical skill-gap had been overlooked (EV6). The Achieve defines employee objectives; a continuous two-way communication between manager and employee determining people, skills and competencies required to fulfill organisational strategies and individual objectives. Opportunities arise from this like future career aspirations, learning and development, secondments, and re-deployment (EV14). Osing (ND) state such people plans serve the strategy and objectives of an organisation.

CIPD (2018) reflect technology is key for workforce planning; algorithms, robotics and artificial intelligence impacting how and when we do work, this is something Ateb lacks instead it leans towards a combination of formal and informal practices such as systematic techniques and personal judgments considering the external environment creating business cases' for Board approval.

Ateb's approach to COVID-19 is 'business as usual' choosing not to furlough its workforce for social and ethical reasons. Contingency financial data was explored; based on this information EMT believes we can operate homeworking adjusting resources and skill deployment adapting our services we offer and job roles when required (CIPD, 2020). Furloughing the workforce does not fit with Ateb's values as a social entity. Recruitment has halted for the short-term, current advertisements frozen, new recruits deferred; both communicated with together with the current workforce to alleviate unnecessary worries regarding business capability. This will be reviewed quarterly following CIPD guidance (CIPD, 2020) (EV6; 7,15).

Considering the current situation Contract of Employments are rigid (EV16) however, Role Profiles provide the flexibility to adapt compared to the traditional job descriptions and person specifications (EV2). These are based on generic competencies and service area outcomes like teamwork, innovation, and problem-solving allowing flexibility. These initiatives have a positive effect on employer brand; employees have been motivated to assist the community; they continue to work having a purpose.

Internal and external information

Ateb does not conduct a competitor analysis regardless of its competitors; Pembrokeshire County Council and Wales and West Housing Association offering similar roles. Employee turnover is low (EV17) which could be a result of Ateb's organisational position reflecting an 'employer of choice'; offering median pay determined by external independent benchmarking (EV18) securing competitive salaries, creating a positive psychological contract, rewards, and growth opportunities via OFW including above average annual leave, job challenge, flexible and agile working practices (EV3), (Wilkinson and Taylor, 2016; Higgs, 2004).

Wilkinson and Taylor (2016) cite four stages to talent planning; forecasting future demand for skills; forecasting skills needed for the future; identify gaps between future demand and supply skills and planning to fill such gaps.

Ateb demonstrates this: -

Replacing existing vacancies following voluntary or involuntary departures reviewing Role Profiles discussing with EMT potential future resources. The new Chief Executive encourages Role Profiles to be reviewed and amended if necessary. When the Maintenance Supervisor (Repairs) post was vacant it was decided not to replace like-for-like after reviewing internal repairs data, instead creating two Team Leader's position's upskilling internal labour, boosting morale offering progression (EV19).

Ateb identifies secondment opportunities based on similar skill-level and capacity within teams ensuring employees wishing for job challenge can with lateral-moves. This is undertaken through devolution of line-managers developing internal talent and the Achieve (EV14), (Taylor and Wilkinson, 2016).

Following process-mapping streamlining services and processes the Housing Department identified non-compliance areas, skill gaps and cross-over between roles therefore proposed a restructure; additional positions like Electricians and Compliance Administrators filling skill gaps, together with upskilling employees into expanded roles. The Maintenance & Compliance Manager presented a range of information to Board; costing implications of outsourcing external electricians compared to in-house team, future changes to electrical regulations, internal information like process-mapping and customer needs (EV8; 12).

With a newly developed Facilities Team an Estates Coordinator was recruited. Over the past year many non-compliance issues were raised relating to Health & Safety at Work Act and other regulations. Using personal knowledge, experience, and legal requirements a business case was prepared detailing; under-resourced team proposing

a new structure and vacancies, Role Profiles detailing competencies identifying skill-level, mismatches, upskilling together with training and development needs. Due to non-compliance, costing was not factored (EV10; 11).

External consultants assisted in developing a training analysis for Ateb's workforce focusing on; best practice, Health & Safety, compliance, identifying gaps and training requirements for job roles. Due to COVID-19 and homeworking this will be achieved via e-learning re-skilling and motivating employees in this period of down-turn (CIPD, 2020), (EV20).

Due to COVID-19 Ateb examined its existing resources re-deploying employees ensuring retention of valued employees (Taylor, 2019; Wilkinson and Taylor, 2016; CIPD, 2019). Job roles experiencing down-turns in performance were re-deployed to the new Welfare Team; providing check-in calls to our vulnerable and self-isolating customers by; shopping, prescription service, and signposting them to key services from mental health, financial assistance, to community groups in their locality (EV21; 22).

When resourcing the Welfare Team, considerations factored were; contract type, who had transferrable skills and the capacity in their current teams. A Customer Services Advisor ending her secondment was re-deployed due to her people skills and knowledge of tenants and capacity in her team. A People Assistant on a fixed-term contract was re-deployed due to knowledge on HR systems providing valuable information to the Team on employees; those who could deliver shopping and those who were self-isolating, had a medical condition, on annual leave or those living nearest to tenants (EV22).

The Operation's Manager in Mill Bay Homes, Ateb's subsidiary which operates commercially uses housing market data when workforce planning. Due to uncertainty in the sector following COVID-19 the live recruitment of the Site Inspector & Construction Advisor was halted and Sales Negotiator delayed (EV7, 23).

Current organisational planning addresses potential needs

To conclude, Ateb regularly investigates talent planning via discussions between Managers and EMT considering future resources and process-mapping adapting to the changing environment. CIPD (2018) states it is not an exact science it is about reducing organisational risk, improving business performance taking a proactive approach. It would be advantageous to use more real-time data for better forecasting to talent supply and demand (Tucker, ND). Ateb lacks prescriptive processes like scenario planning and skills audit therefore to explore these formal channels (CIPD, 2018; Taylor, 2019).

Ateb has heavily invested in its branding using an external consultant conducting a website analysis, rebranding, and redesign. Ateb regularly uses social media to share information and provides comprehensive information to potential applicants on what it is like to work for Ateb. Marr (2018) reflects employer brand is essential in attracting and retaining top talent (EV24).

Ateb offers secondments, lateral-moves, deployment opportunities (EV6; 14) however, greater communication and equal access to such opportunities could be explored. It could develop career development schemes to formalise succession planning with a robust selection process spotting competencies devising a 'talent pool' for business-critical positions identifying workforce's composition like those retiring.

This could be supported by Achieve which has multiple facets and is often utilised as a performance tool therefore, greater communication surrounding its benefits with increased effort encouraging a coaching and development approach removing managerial bias is required.

Change-readiness is reflective in Ateb's flexible practices and its approach to COVID-19; remote working has been embraced together with redeploying employees to business-critical areas. To stay ahead of the curve and its competitors' innovative policies and procedures should be explored focusing on attracting multi-generational workforce (Pratt, 2020), (EV22).

L02.

Recommendations:

To invest in real-time data, metrics, and analysis tools utilising technology assisting with talent planning.

Briner (2020) reflects a range of sources and types of evidence is needed to complete 'the bigger picture'. Ateb relies on managerial assumption and uses little internal data to forecast supply and demand like; skills-gap or scenario-planning (EV6). Ateb measures recruitment (EV25) yet does not benchmark this against sector or competitors reporting to Board on vacancies filled and unfilled and costs. It measures turnover; voluntary and involuntary and although the turnover rate is low the true reasons for leaving are not measured. Exit Questionnaires (EV26) have been developed recently with this in mind. Both sources of data could be valuable to Ateb providing data on the top reasons for leaving like; lack of career progression or lack of coaching. Investment in analytics would assist workforce planning; supply and demand of talent for a skill-set or job role, skill-gaps, understanding competitors, upskilling or re-skilling your workforce, employer branding, talent acquisition or diversity initiatives (Shapero, 2017).

Biro (ND) recognises to leverage human capital we need to use data, metrics, and analysis to assist with retention, attrition, performance, recognition, passive and active candidates.

To develop career development linked to Ateb's values and strategic goals encompassing the entire workforce with equal access.

Ateb would benefit by a formal process linked to the Achieve Framework developing competencies and leadership competencies 'growing their own talent' for business-critical positions developing a 'pool of talent'. This was evident with the recent departure of the Finance Director causing Ateb 'organisational vulnerability' (EV6) highlighting identifying successors cannot sit solely with line-managers. Ensuring fair access will allow equal opportunity to progress, reduce favoritism of line-managers effectively picking and choosing whilst building an engaged and motivated workforce.

CIPD (2020) cite is important to avoid 'tunnel vision' when considering talent, an organisation's future strategy must consider likely capabilities for business-critical roles and skills needed for the future to effectively succession plan. This ensures talent is engaged and retained, it adds value to employer brand, builds a high-performance workplace, encourages continuous learning and is a source of competitive advantage (Taylor, 2019; CIPD, 2020).

Innovative policies and procedures

Ateb has embraced change-readiness during COVID-19 going forward it needs to adapt policies and procedures giving greater flexibility accommodating different types of employees and schedules ensuring it attracts and retains a multigenerational workforce; offering diverse experience and skills (Addison, 2020). Retaining older workforce is essential due to their skills and experience whilst attracting young talent is equally critical to remain competitive (Cox, 2020). Without considering family-friendly policies Ateb could see higher absenteeism and lower productivity post crisis (EV6), (Renjen, 2020; Lyonette et al, 2019).

LO3.

Recruitment

CIPD (2020) state recruitment is to attract and select the best candidate with the right skills, competencies, and capability. Ateb ensures effective recruitment by its processes which I follow and are time specific.

The Finance Team had two voluntary departures as Finance Assistant's (FA); the team was under-resourced at the financial year-end.

Traditionally, existing positions are replaced like-for-like; this was Finance's desire. EMT discussed the recruitment and I was instructed by the Chief Executive to recruit both positions on fixed term contracts for 12 months. The Finance Manager was unhappy, pushing for longer fixed-term contracts however, the request was unsuccessful. Factors determining the contracts were; the team's future composition, new Directorship, possible changes in future working practices and technology investment.

(EV6; 27)

Roles and responsibilities

As a People Advisor I lead on all issues affecting the Finance Team. I liaised with my Manager; People & Communication Manager and the Chief Executive together with the Finance Manager initially followed by the Finance Officer and Financial Accountant with regards to recruitment and selection of the posts.

I acted as go-between negotiating type and length of contracts between the Chief Executive and Finance Manager. The Finance Manager was not on the recruitment panel instead focusing on strategic priorities undertaking the Director's activities in the interim. The Finance Manager made it clear to me the recruitment needed to be fast, as a priority with advertising immediately.

The People Team was working to its capacity with unprecedented high levels of recruitment therefore I was mindful timeframes had to be mutually agreed between the recruitment panel and myself as to when we could advertise, shortlist and interview.

(EV6)

The panel is responsible for screening candidates from shortlisting to choosing the successful candidates' although the panel Chair has final decision. It was determined the Financial Accountant would Chair due to previous experience with the Finance Officer shadowing. I took an active role as panelist; providing guidance and support ensuring employment legislation is adhered to and the panel is free from unconscious bias.

The Finance Officer was new to recruitment therefore I gave an overview to shortlisting, interviewing, and avoiding unconscious bias using literature I obtained online (EV28; 29; 30).

I am responsible for all administration duties ensuring these are conducted in a timely manner. CIPD (2020) state candidates are openly sharing experiences online,

therefore, inefficient, or poorly designed processes can have a negative impact on employer brand and future ability to attract talent.

I understand while resourcing, candidate experience is key, therefore, advertisements must be on-brand, using stock photos' and writing in Ateb's style for consistency displayed on Ateb's website. Candidates can assess whether they met Ateb's expectations and want to work for us by accessing Ateb's website (EV24).

For me to do this, I asked the panel to review the following documentation: -

- Applicant letter (EV31)
- Advert (EV32).
- Recruitment Pack, About us... (EV33).
- Role Profile (EV2).

On receipt of these, I prepared advertising material uploading the advert online. I advise which online-platforms to use like Facebook, LinkedIn, CHC website, This is Housing or specialist social media sources. On this occasion, as posts were non-managerial, I opted for Yammer our internal network, Facebook, LinkedIn and Indeed agreeing this with the panel. Ghosh (2019) state the importance of sourcing the right target audience when attracting candidates.

I upload documents to Harbour an applicant tracking service (EV34), corporate website (EV35), LinkedIn (EV36), Yammer (EV37) and Facebook (EV38). By using an applicant tracking service, recruitment and selection is fair and transparent.

I devised a shortlisting matrix using the characteristics and attributes within the Role Profile; these are the leadership styles Ateb requires from employees. Each panel shortlists independently then collectively discussing scoring; those with the highest scores progress to interview. The selection criteria determine who is best suited to the role any discrepancies are discussed, as HR representative I ensure this is fair and subjective (EV39).

I provide sample questions to the panel requesting their input devising the interview questions and matrix. I liaise with panel members relating to assessment criteria; offering a job specific test measuring capability and skill (EV40; 41; 42). Each panel member asks questions; finance asking technical questions and I focus on Ateb, culture and values seeking the best-fit candidates. The interview matrix is used to score; same approach is taken as with shortlisting process.

Stakeholders are selected to form 'coffee and chat' providing subjective feedback on candidates hence I brief, in advance, regarding equal opportunities in employment, protected characteristics, and questions to avoid discrimination (EV43).

The panel deliberate over scoring and tests before deciding on successful candidates. I telephoned candidates offering the position provisionally until the relevant references, medical clearance and immigration documents are provided. I regret all successful candidates.

(EV6; 27)

Organisational and legislative requirements

Ateb does not have a recruitment and selection policy covering newly devised Role Profiles and current practices. It does have robust processes which I follow ensuring legal obligations. I attend external courses and briefings by my Manager ensuring Ateb remains compliant (EV6).

Pre-shortlisting

Applicants were informed of the data Ateb holds, its purpose and how its processed following the General Data Protection Regulation 2018 (GDPR), (EV44). Applicants also consent to provide equal opportunity data when applying which is used for monitoring (EV45).

As a social landlord in Wales, Ateb complies with Schedule 1 of the Housing Act (1996); not employing a close relative of an employee or Board Member, and not re-employing former employees within 12 months. I ensured these questions were within the application form (EV46).

Pre- selection

I ensured when advertising the FA positions Ateb was promoted as an equal opportunities' employer ensuring wording and images were non-discriminative. I ensured the application form did not ask questions like health or age and is available in a different format complying with the Equality Act 2010 (EV46).

I ensured the panel judged applicants on objective criteria like skills, experience, knowledge, and competencies reflected in the Role Profile not on personal factors; being aware of unconscious bias at interview and testing stages (EV27). The panel observed employment legislation; Equality Act 2010 whereby applicants were not discriminated against a protected characteristic (EV27; 43).

When inviting shortlisted candidates to interview I offered reasonable adjustments. A candidate had dyslexia therefore was given additional time at testing stage (EV47).

Following CIPD (2018) best practice there are pre-employment checks to consider when vetting candidates like criminal record checking. I ensured the FA candidates evidenced their right to work in the UK complying with Immigration Act (2016) like seeking passports together with the validity of their qualifications on the day of interview (EV48).

Post selection

When offering both candidates', the FA position I provisionally offered seeking satisfactory; references, health clearance via independent Occupational Health (EV49).

On receipt of satisfactory clearances, providing confirmation of offer of employment (EV50) and Main Terms of Employment; this is legal right on day one or before employment as from 6th April 2020 covering details like pay, working hours, notice period and probation-period (EV51).

(Croner-I, ND; Gov, ND; ACAS, ND).

Materials and resources

When planning for the FA I followed the recruitment checklist (EV52); explained in role and responsibilities.

Additionally, I diarised the closing date (EV53); prompting me to remove advert from Ateb's website and Indeed. I scheduled diary appointments with panel; to shortlist collectively and interview date. I scheduled diary appointments for meeting rooms on interview day, a room for tests to be conducted and invited key stakeholders to 'coffee and chat'; opportunity for candidates to meet a selection of employees finding out what it is like to work at Ateb (EV54).

I prepared a timetable for interviews scheduling; test, 'coffee and chat' and interview. I ensured candidates did not overlap and were not waiting long-period at any stage (EV55, 56).

I provide recruitment packs to the panel ensuring they have documents required (EV2, 32, 39, 40, 41, 42, 55) to effectively shortlist and interview.

I prepare rooms in advance, displaying do-not-disturb signage: -

Shortlisting: ICT equipment allowing laptop to be connected to television sharing a large screen.

Interviews room and separate coffee and chat room: glasses, water, clock is visible and setting rooms appropriately.

Test rooms: laptop, clock is visible, glasses and water.

I ensure panel members, including myself, complete shortlisting and interview matrix's scoring candidates, providing reasons of success or failure in the process (EV39; 57) as well as detailed notes to interview questions (EV58). This enables me to provide feedback to candidates on performance and if required can be used as evidence demonstrating a subjective process.

Following organisational processes ensuring activities are adhered to within the set timeframes like: -

To ensure the People Team provide a streamline and efficient service, as a team, we collectively agreed timeframes which I adhere to when recruiting and selecting for the FA positions (EV59): -

Task	Timeframe
I drafted advert, Role Profile, recruitment pack	Same day requested by Finance Officer
I uploaded the FA vacancy after the recruitment documents were signed off by the Finance Officer	Within 24 hours
I provided the shortlisting matrix after the post-closed	Within 24 hours
I invited candidates for interview after the shortlisting panel meeting	Within 24 hours
I finalised the recruitment pack	By mid-day, day before the interview date
I offered successful candidates	Within 24 hours
I sent provisional offers to both candidates together with medical health form, seeking references, and checking outstanding immigration and certificates	Within 48 hours of verbal offer
I sent regrets letters after the FA posts were offered	Within 48 hours
I set a reminder to ensuring GDPR compliance	Diarised to destroy candidates' data in 6 months
Sought panels views on the process; whether timeframes were met.	After the FA post closed
I updated internal Service Hub ensuring quarter-end reports could be generated and reviewed	Within 1 months
I ensured Main Terms of Employment setting out particulars of employment were ready in advance of starting date detailing induction plan and training requirements (ACAS, ND)	The day before start date

(EV6, 27, 59)

Reflection

I performed efficiently ensuring the process was fair and transparent observing employment legislation and GDPR.

There were six candidates interviewed; the process had three stages 'coffee and chat', test, and interview. I planned the schedule well where candidates were not waiting at one stage for long (EV55).

Majority of recruitment is sourced externally it would have been advantageous if I explored the internal labour market; positions were filled by internal employees on shortly to expiry fixed-term contracts. This would have saved time and provided cost and organisational effectiveness (Taylor, 2019).

Information obtained by SurveyMonkey is reviewed in its basic form; reporting on percentage of employable candidates, time-to-fill rates, costs, and level of managers satisfaction within the Service Hub (EV25). Measuring my own performance based on line-manager reviews is collated in the Recruitment Service – Customer Satisfaction Survey (EV60) by individual responses of vacancy and then quarterly for all vacancies advertised (EV61). My results for the FA positions clearly demonstrated that the recruitment process was effective with no improvements identified. For this recruitment, the Finance Officer gave me praise for my role in my Achieve, at point 71 (EV62).

SurveyMonkey is used to evaluate candidates experience throughout the process. Initially, these were sent on successfully filling the position; this was ineffective as candidates failed to respond or were negative. Reviewing this it was decided to use an iPad requesting candidates to complete on day of interviews; this was ineffective as we only received positive feedback as the questionnaire was completed at Ateb's office. After discussions within the People Team, once candidates are shortlisted awaiting to be interviewed, we decided to send this small pool of candidates the SurveyMonkey measuring the process. Out of the six candidates selected four responded; the results were positive (EV63). The information is collated in the Service Hub; the information is shared quarterly with managers, EMT and Board. If negative feedback is received, I review its validity discussing this with the panel to establish whether any changes to the process can be made. I reported to the panel that we received no negative feedback.

I have utilised Gibb's reflective cycle to assess my own performance (EV64).

EV. 1

Vision

of what good looks like for ateb

ateb *better living solutions*

 9/ Intro

 9/ Group

 9/ Purpose

 12/ DNA

 19/ Plan

 28/ Deliver

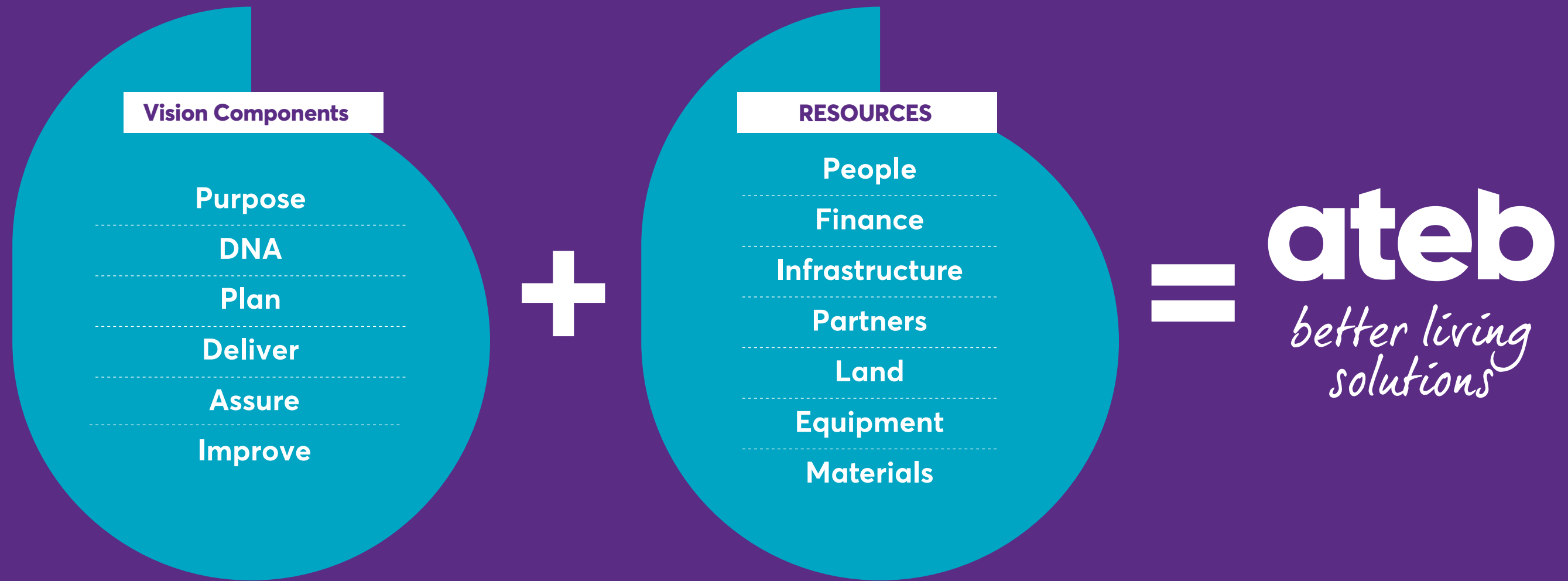
 28/ Assure

 32/ Improve

 40/ Summary



Our **Vision** describes how **6** components will collectively get the best from the resources we use:



Our world doesn't stand still so nor should we, our vision of good will constantly evolve to reflect our changing circumstances, demands, operating conditions and relationships.



Our purpose:

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

**Creating
better living
solutions...**

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



We believe that:

Better living starts with a place that we can call home. A home is more than just a house; it's a **safe, stable, secure environment** from which people can live their lives.

Not everyone can achieve this without help, we will create a variety of solutions to help and support people and communities to make more homes.

This means that we must find creative ways of;

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



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

We aspire to a culture or DNA that has:

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

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

#InYouWeTrust
#AccessAllAreas
#GetThingsDone



What's in our DNA?

#InYouWeTrust

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

#AccessAllAreas

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

#GetThingsDone

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

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



The ateb group leadership hierarchy is as follows:



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

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



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

> **Promotes our Purpose**

> **Supports our DNA**

> **Sets clear outcomes for our efforts**

> **Defines operating boundaries and risk**

> **Promotes learning over failure**

> **Supports colleagues to experiment to achieve more**

> **Appreciates colleagues' achievements, efforts and commitment**

We believe that good leaders will always:

1/ Pay **attention** to people

2/ **Understand** people needs

3/ Show **empathy** in their response

4/ Help to **resolve** issues



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

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



**What our
customers
should
expect ...**

Our Shared Commitment ...

Above all, we will continually
strive to deliver...

the right **outcomes, efficiently**
with **great customer experience...**

for the people and
communities of West Wales.

Finance Assistant

Emp. ref	>>>
Role profile	06/19
Joining date	>>>
Last updated	13/01/2020



5	1/ Support all other service areas to achieve their outcomes where they require my input 2/ Continually review my service area outcomes to ensure they achieve the right outcomes, efficiently with great customer experience. 3/ Consistently demonstrates values of equality and diversity 4/ Take responsibility for my own personal development 5/ To undertake any other duties as required which are compatible with the requirements of the post
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4/ Corporate Responsibilities

Ref	Service Outcome	Role
SA/17	<u>Strategy</u> <i>Clarity on how we will maximise our purpose</i>	Help develop and deliver the right strategic priorities to achieve our strategic aims
SA/19	<u>H&S</u> <i>We meet our legislative and regulatory H&S requirements</i>	Take personal responsibility to ensure that I and my team abide by the relevant legislation, the organisation's H&S systems and common sense so that I, the public, my colleagues, customers and partners are safe and secure at all times
SA/20	<u>PR/Marketing & Communications</u> <i>Positive growth of our brand. The right messages to the right audience at the right time</i>	Make sure that communication with and from my team is effective and supportive to all. Promote our work with various audiences that support our Purpose, DNA and our strategic aims.
SA/22	<u>Performance & Data Management</u> <i>We know where we need to improve, where we are not compliant and where we are at risk</i>	Always seek to understand whether we are achieving our required outcomes, efficiently and with great customer experience and plan and deliver improvement and growth where identified through managed change programmes
SA/23	<u>Procure / Supplier Management</u> <i>To ensure we compliantly deliver Value for Money services</i>	Make sure my team abides by the procurement rules and systems established by ateb. Make sure that any procurement required achieves the right outcomes

5/ Personal characteristics and attributes I will need to demonstrate

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

Leadership Style	Characteristics and attributes
Technical Competency	Have a good level of competency in Finance. Likely to have experience of working in a finance office environment with direct or easily transferable skills and expertise relevant to the role. Must be able to demonstrate a high level of numeracy, for us this means achieving success at GCSE or equivalent qualifications but we are happy to discuss this with you.
Decision making	Will be confident to make the right decisions to ensure the best service outcomes. Making decisions involving checks and comparisons, using personal/professional judgment and knowing when to seek advice.
People management	Willing to learn from others and share own experience and knowledge. Let team members know what is expected of them

Leadership Style	Characteristics and attributes
Team working	Need to create the right environment for teamwork to thrive both internally and externally. Be able to lead and participate in teams effectively
Financial control	May have responsibility for purchasing, cash or stock and should be able to review and report on budgets as and when required.
Organisational skills	Will be able to effectively set own work plan and prioritise key tasks.
Innovation	Must show a desire to improve and challenge what we do to constantly improve our service outcomes, efficiency and customer experience. Identifies, plans and implements improvements within the team which support service delivery.
Customer service	Always aim to provide a great customer experience both internally and externally. I need to be able to demonstrate the importance of customer service to my team and colleagues by putting the customer first.
Project / process management	Project manage improvements within my and others service areas to ensure the desired outcomes are achieved. Takes responsibility for achieving individual objectives and contributing to team and group projects.
Enthusiasm	Show I am a self-starter and will bring my personal drive and positive attitude to help all find solutions to problems. Will be able to: promote and demonstrate our DNA at all times, to improve and grow our business. How will I make a difference?
Technology Competency	Confidently use ICT systems to deliver and improve my service delivery. In particular, I will have good knowledge of the Microsoft office suite of software especially Excel, the ability to use multiple ICT systems within the work setting; keeping up to date with training courses would be great.
Communication	Be able to promote good communication throughout the organisation (verbal, written, face to face), ensuring teams are involved, informed and engaged at all times Ability to speak Welsh would be great

6/ Terms and Conditions Summary

Full details of the terms and conditions for this role can be found in your Statement of Terms and Conditions. In return for undertaking the above role, Ateb will provide:

Term or Condition	Detail	Additional comments
Base Salary	£TBA	Per annum paid on the 28th of the month or the previous Friday if the 28th falls on a B/H, Sat or Sun.
Car user	Not an essential car user	If you do travel off site for meetings you will need to have a car available for business use, mileage will be reimbursed at HMRC standard rate
Simply Health Scheme	Basic level contributions	The group offers a contributory health plan Simply Health, you can increase your cover to suit your needs, subject to eligibility.
Hours per week	37 Hours	A flexible working system is in operation depending on your particular role and service outcomes

Our Future Workplace

#We Are 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."



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.

Trust Clock

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.

Purpose:

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

Who needs to know?

All ateb teams.

What else do I need to look at?

- > The Vision
- > DNA
- > @ateb

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

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

Purpose:

To give all an overview of our potential @ateb benefits

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

Who needs to know?

All ateb teams.

What else do I need to look at?

- > The Vision
- > DNA
- > @ateb

From: Tom Waters
To: Joanne Thomas; Kate Houston
Subject: Write up for LinkedIN
Date: 12 May 2020 14:12:11
Attachments: Welfare Team Write Up LinkedIN.docx

Hi Both

Write up attached. If its too long please feel free to amend.

Thanks

Tom

We are aware that for many of our customers Covid-19 will have a significant impact on their lives, finances and mental health. In response ateb have developed a Customer Welfare Team with 3 simple aims.

1. Keep our customers safe and secure in their home.
2. Help our customers get the financial support they need.
3. Do everything we can to support the wellbeing of our customers.

We have redeployed 5 full time staff to the Welfare Team along with help from staff from across the organisation. In the month of April a total of 50 staff helped customers with Covid-19 related support through our Welfare Team. Staff helped by carrying out welfare check phone calls, helping customers use technology to keep in touch with family & friends, collecting food parcels from our two local food banks and delivering to our customers, and much more.

We have a total of 107 staff which means an incredible 47% of our staff have already supported our customers directly (by phone or in person) during this crisis.

In April, our Welfare Team made 747 welfare calls to our most vulnerable customers in general needs properties. Our Supported Living Team made a further 1402 calls to our customers living in our extra care and supported housing schemes. That's an average of 107 calls per working day.

Tomos Waters who is leading our Welfare Team describes the nature of our welfare calls

"We have three questions we like to ask during our welfare calls, how are you? have you got anyone who can get you food? and have you got enough medication? We are finding that many of our customers who are isolating are struggling to get food supplies delivered, especially if they haven't received a letter from the government. In that situation we are utilising some fantastic local organisations; PATCH, Pembrokeshire Food bank, Pembrokeshire Hub, Pembrokeshire Next Door, are just a few examples.

"We are also finding that a lot of our customers are struggling with their mental health and loneliness. We have found Age Cymru's Check In and Chat service to be a great help for our older customers, so they have that extra person to chat to during what might be a very lonely week. We are also grateful to Pembrokeshire MIND who have been supporting our customers under 70 who also might be struggling at the moment."

"Our team are working closely with some amazing local and national organisations to help our customers get the support they need. I would like to add a big thank you to those agencies, a big thank you to our staff, and finally a message for any of our ateb customers who might be out there, that missed our letter or have not had a phone call from us and might be feeling a little down or might need help – please give us a call. We will do everything we can to find the help you need, no matter how big or how small."

If you know an ateb customer that could benefit from a welfare call, please contact ateb on 0800 854 568

For more information or to see a list of frequently asked questions, please visit our website <https://www.atebgroup.co.uk/latest-updates-on-the-coronavirus-impacts-to-ateb-services/>

[#itmatterstous](#)

[#withyou](#)

[#weareateb](#)

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 following 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 compliant
- 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.

From: Victoria Evans
To: Kate Houston
Subject: Statement
Date: 29 May 2020 08:53:49

Hi Kate

Following our discussion

- Workforce planning is driven by leadership and management who are responsible for drawing up a business plans for Board approval. Ateb has recently had several re-structures following process-mapping departmental processes, as well as the introduction of new roles. Evidence is gathered in various ways including managerial judgements, benchmarking and costs of services.
- Ateb does not formally succession plan however, since the arrival of our new Chief Executive, there has been a focus on “closing the gap” between the Executive Team and the Management Team. Prior to this managers were very operational. A leadership development programme was secured which focused on changing attitudes and behaviors as opposed to putting managers through qualifications, as we felt this was more important to the change we were looking for. Supervisors and Team Leaders were also put on this development course as they were not functioning at this level throughout the organization. Leadership groups were established which took the form of Corporate and Service Groups, Department Managers had a much greater involvement in performance management and strategy, improving skills and “closing the gap” between them and the Executive Team. Leadership competencies were established and expectations set out for all team members, these have been incorporated into role profiles which then will also feed into the Passport to Work which sets out the L&D required for each role. This was apparent with the recent retirement of a Director as senior key roles were not operating at a strategic level. The Achieve Framework will support upskilling management through identifying skills, competencies and responsibility levels will be addressing skills gaps.
- The People Team have experienced difficulty filling certain roles such as trade roles, due to this Ateb is considering ‘growing our own talent’. Apprenticeships would be offered for the hard to fill roles with the view to retain the apprentice filling a qualified role at the end of their apprenticeship.
- Ateb regularly offers secondments, deploying employees via lateral and vertical moves to support employee development.
- The COVID-19 pandemic has required us to pause recruitment while we assess the priority service areas and the impact of COVID-19 on our future plans. We have not furloughed any team members at the moment, rather they have been redeployed into alternative roles in the organization such as the newly formed Welfare Team. The Executive Team believe furloughing does not fit with our values. We are now in the process of looking at our recovery plans and how this will impact on our staffing, offering more flexible policies and L&D requirements over the next financial year, reviewing quarterly. Due to the unease COVID-19 has caused, the Communication Team regularly keep Teams aware of progress.

Finance Assistant positions statement

Kate is the lead People Advisor for the Finance Team and recently supported the team to recruit vacant Finance Assistant positions. Kate experienced difficulty at the beginning as she liaised between the Finance Manager and the Chief Executive on the terms of the contracts, often being the person in middle. I thought Kate dealt with both sides well, acting professional and supportive at all times.

As the People Team we are often asked to recruit as soon as possible with little consideration on the team work commitments. Kate informed the Finance department in a provisional manner that we were experiencing high demand from other departments, increased workload and annual leave therefore, they should anticipate some delays before the recruitment campaign could begin. Again, Kate dealt with this aspect well.

Kate dealt with all administration from uploading the advert to offering the positions. Whilst Kate deals with administration, she is also a key panel member shortlisting and interviewing as the HR lead to ensure employment laws are not compromised.

To ensure Kate is updated on latest employment law I regularly hold briefing sessions with her and she attends our solicitor's updates. The People Team have devised our own best practice to ensure we offer an efficient service meeting timescales.

Victoria Evans

People and Communications Manager



Tel | [01437 763688](tel:01437763688)

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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: Matthew Owens
To: Kate Houston
Subject: Workforce Planning
Date: 28 May 2020 15:09:35
Attachments: Mill Bay Homes Response to Coronavirus Crisis.docx

Hi Kate

For existing positions when MBH has a vacancy I replace like-for-like this is based on my own judgment and assumed future requirements.

I re-evaluate the Role Profile in case changes are needed.

Attached Mill Bay Homes response to coronavirus crisis.

Matt

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Mill Bay Homes Response to Coronavirus Crisis

Background

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

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

I've summarised some of the key observations below:

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

Current Position

We have approached the planning of this difficult year as follows

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

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

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

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

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

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

Matthew Owens
Operations Manager
Mill Bay Homes

Cost Considerations for Expanding ateb's Electrical Services Team

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

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

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

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

Based on this, the estimated costs will be £112,000 which is comparable to the current internal recharge rate for 2 electricians (£103k).

However, we spent £164,000 with John Morley in 18/19 but that includes some day to day repairs and materials and labour for repairs required as a result of carrying out EICRs.

Quote Analysis - Electrical Installation Testing

Description	Heywood Electrical	John Morley	Ling Electrical	Averages	vat @	Cost Per Item	Units pa	Cost
Periodic Inspection and Testing of Domestic Electrical Installations within Housing Stock	£60.00	£75.00	£141.00	£92.00	£18.40	£110.40	712	£78,604.80
Non-Domestic Circuit inspection and test inspection and test rate per circuit	£12.00	£15.00	£20.00	£15.67	£3.13	£18.80	1760	£33,088.00
Supply and install replacement Non combustible consumer unit (including all residual current devices, miniature circuit breakers or RCBO units, blanking plates and fire stopping, etc) Inspected, tested and certified with Electrical Installation Certificate	£266.74	£240.00	£275.00	£260.58	£52.12	£312.70		
Hourly rate (for all works outside the scope of the above items)	£25.00	£24.00	£24.50	£24.50	£4.90	£29.40		
Hourly rate (out of hours and in hours emergency response)	£35.00	£60.00	£35.00	£43.33	£8.67	£52.00		
Material Nett trade prices +	20%	0%	10.00%	10%	£0.02	£0.12		
Supply and Fit Smoke/Heat Detector replacement (base & head) per unit	Smoke - £36.58 Heat - £56.98	£44.00 on job £38.00 plus hourly rate any other time	AICO 3016 - £50.00 AICO 3014 - £55.00 AICO 3018 - £68.00	£56.33	£11.27	£67.59		
Supply, fit and certify a 13-amp 2 Gang RCD (30 m.A.) Socket Outlet	£45.00	£21.00	£40.00	£35.33	£7.07	£42.40		
In-Service Inspection and Testing (PAT) of Specified Ateb owned electrical equipment (per item)	£1.50	£1.50	£4.50	£2.50	£0.50	£3.00		

CONFIDENTIAL REPORT

ateb

Independent pay benchmarking report

Post(s):

2 x Team Leader roles

August 2019

Client brief

We were commissioned by ateb to undertake an independent market pay benchmarking exercise for the following two posts:

- Heating and Plumbing Team Leader
- Maintenance Team Leader

We are pleased to provide the results of our research below. We provided some initial data for ateb that was much higher than expected. This report sets out the results of our additional research and further commentary about the market.

The data is based on the current 2019/20 financial year.

Method

To conduct the market pay research we considered broadly comparable posts and carried out an independent, desk-top benchmarking exercise collecting basic pay details to build up a picture of the market value of each post. The data provided is based on the external 'going rate' for the posts and not on any specific person that might occupy a post.

The comparator group used in our research includes similar posts found across all employment sectors as both posts are transferable. Some of the data does come from housing sector peers.

Our data sources include:

- Our extensive database of pay and benefits for 2019/20
- Pay survey information including data collected through subscriptions and data freely available from published sources on the internet
- Client information that we hold and are able to use without breaching client confidentiality or data protection regulations
- Recently advertised posts in relevant job boards and websites.

Our research also seeks to reflect the skills, abilities, qualifications, experience and personal attributes of the ideal post holder; we make our judgment based on the section covering personal characteristics and attributes provided within the same documents.

Market pay findings

Our market pay findings from the salary benchmarking exercise are set out in the table below. We re-iterate that the data is relevant for the 2019/20 financial year.

As some of the data used in our research is not in the public domain or has been provided on the basis of retaining appropriate confidentiality regarding potentially commercially sensitive data, we are unable to quote all our sources.

Providing the data in the traditional format shown below ensures that the information is not traceable to any individual. Our approach is in line with best practice for data protection and information security.

Table 1 shows the data which is based on all employment sectors and the data is drawn equally across south and mid Wales.

Table 2 shows the data which focuses on west and mid Wales and the majority of the data is drawn from the housing and public sectors and smaller private sector employers.

Table 1: Market pay data for 2019/20

Post	Lower quartile (£p.a.)	Median (£p.a.)	Upper quartile (£p.a.)
Heating and Plumbing Team Leader	31,569	33,423	35,457
Maintenance Team Leader	30,000	31,610	32,971

Table 2: Market pay data for 2019/20 - results of additional benchmarking

Post	Lower quartile (£p.a.)	Median (£p.a.)	Upper quartile (£p.a.)
Heating and Plumbing Team Leader (revised)	29,908	30,689	31,579
Maintenance Team Leader (revised)	23,163	24,250	25,755

Please note that the data represents base pay only and excludes any additional monetary benefits such as pensions, health care or bonuses.

Research commentary

The data is relevant for south Wales, and is based on working Team Leader roles. In some organisations the equivalent is designated as a senior or chargehand.

ateb is likely to be aware that:

- The private sector often offers posts at higher pay than the social/ affordable housing sector. However, the wider employment terms are typically less attractive,

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

Hi both

Personal Statement restructure Facilities Management at Ateb

- How did you identify gaps?

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

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

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

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

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

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

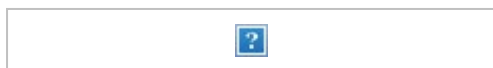
My report highlighted the gaps and concerns and proposed a small restructure which would ensure we became fully compliant with the law. It recommended new roles that would contribute to this. I did not include costings at this stage which may have been added for board by others. In a normal business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

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

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

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

Pete Cleary
Estates Coordinator



Tel | [01437 763688](tel:01437763688)

BOARD OF MANAGEMENT

Adoption of a Facilities Management Approach Shared Services

Purpose

This report gives an overview of the current working practices within the shared spaces areas at ateb. It highlights serious concerns that has the potential to have a direct effect on the health and safety of our customers; ateb's reputation and poses a financial risk to the ateb group.

It then proposes to introduce a Facilities Management approach along with a new team structure and solutions that will not only make our estates safer but will add real value to the organisation.

Background

It had previously been recognised that communal areas (also called shared spaces) was serious neglected and not managed. Therefore, an Estates Coordinator role was created to assist ateb manage "shared spaces".

Current position

Facilities Assistants

The 2 Facilities Assistants (FAs) are both mobile operatives. Most of their work is carrying out routine but vital H&S checks in properties that have communal areas. In addition to these checks they are often called to remove refuse from all areas as required.

The checks carried out by the FAs consists of fire alarms, emergency lights and brief audits of mainly internal areas. Fire alarms weekly checks are carried out in shared spaces and assistance is also given to testing the alarms in some of the schemes. The fire alarms are tested weekly and emergency lights monthly. No processes exist for these checks and record keeping is very poor.

The external H&S areas checks are seriously neglected. This has been proved recently where ateb received a civil claim for injury which we were not able to defend.

For information:

- Liability claims continue to account for 47% of claims notification.
- The average cost of claim is £4342
- 30% of liability claims are due to trips, slips and falls on defective paving/flooring/floor coverings and liability is admitted in 25% of cases
- 21% of claims are due to defective premises and liability admitted on 21% of cases.

The records of the current checks are not fit for purpose; are purely reliant on the FAs for raising and completing and there is no audit trail. FAs in general swop over areas periodically however the monthly checks are often carried out by the same

Page 1 of 5

person so there are no quality controls in place. It is uncertain if the staff carrying out these roles have adequate training knowledge and experience to be deemed competent. Their potential however is evident. There are no procedures for progressing these reports once completed and lack of ownership for these areas are very apparent. Currently the paper check sheets are scanned onto "somewhere on F Drive" Comments from the FA's are "We record areas of concern quite often, but no one takes any notice"

The FAs have no pace or passion for their roles, feel undervalued and not part of the ateb staff. They feel they have no real purpose and have no idea how their roles support ateb's aims and objectives. Team identity does not exist. No one takes ownership of any defects. It is clear that ateb have provided a very poor environment which is not conducive to a high performing team.

Health and Safety

It is apparent no one takes ownership or responsibility for areas within Facilities Management.

Play areas have a clear process map for inspections but on investigation ateb has been non-compliant for many years. No policy exists. The process map was not followed.

The H&S Manager has recently been instructed not to get too involved with day to day issues but to be more of an H&S adviser. It is generally accepted that the day-to-day responsibility should be taken away for the H&S manager however simply by tagging both of this and contract management on to the Estates Coordinators role in its present state is very unlikely to be effective due to other workloads.

Scheme checks/inspections

Although these are not part of the Estates Coordinator's remit it is important to raise the concerns. At present the Scheme Managers appear overloaded and spend a lot of their time carrying out facilities related H&S. For example, they are left to manage water hygiene. One essential check is to record the flow and return water temperature checks in the plant room. One manager stated "I have never been in the plant room" another showed me around the plant room and stated "I have no idea what all this equipment is, I just press reset buttons occasionally and I know nothing about the flow and return checks". One scheme manager that does the flow and return checks has reported low hot water temperature the H&S Manager for the past 3 months and other incorrect temperatures on TMVs for the past 9 months. It was quite concerning that these low and abnormal readings were not investigated by anyone. The recent water samples revealed legionella bacteria at Williams court which is clear evident of serious lack of management control. Recommendations from the 2017 risk assessments were still outstanding in 2019 which again is concerning.

We are asking the scheme managers to carryout checks beyond their level of competency and in an area that is a specialism. It has exposed ateb to serious H&S risks to the customers. These checks are taking them away from their social care

works in addition Customers are becoming more demanding and requiring more assistance which is adding to the managers workload.

Contract Management

The “list” of contracts held by procurement is well managed on paper and are allocated to managers. However, the management of all Facilities related contracts are in name only. There is a distinct lack of ownership and responsibility with these contracts. This leads to potential H&S and financial risk to the organisations from lack of management control. As an example, the fire alarm company should have carried out a bell sound level check which is clearly defined in their contract, this has never been carried out. This means ateb are paying for a service we are not receiving and ateb are not aware if the fire alarm sounders levels are fit for purpose. It is important to remember that when work is outsourced the management of the contract remains within the organisation.

The Compliance department and H&S Manager are “occasionally” getting involved with operational aspects of contracts. However, these occasional involvements do not include ownership. No resource has been identified for contract management within the Facilities Management area.

Refuse

Rubbish is an ongoing problem within the ateb shared spaces. A proportion of the FA’s time is spent clearing up rubbish and disposal at refuse collection centres. They also help with the voids clearing as and when required. Although the FA’s collect and clear rubbish the actual refuse areas are never deep cleaned and remain in a poor state often attracting many justified complaints. Vermin are frequently reported in these areas. The latest insurance report states we must, as a priority, eliminated fly tipping materials and bulk waste which represents an arson risk. It is very unlikely that we will ever eliminate it, but we can improve our processes in the area.

Cleaning at Meyler House.

The cleaning staff at Meyler House consists of 3 established posts (one vacant) totalling 4.5 hours per night. The FAs on late shift are also expected to contribute before locking up the building. Cleaning schedules are brief, no data sheets exist and COSHH risk assessments are dated 2012.

Conclusion

Poor Facilities Management has led to unacceptable H&S risks and lack of management controls of inhouse and out - sourced works. In summary this equates to

- Inadequately defined policies and procedures
- Non-compliance with statutory requirements and regulations
- No risk management

- Poor contract management
- Unsatisfactory environments for customers
- Ineffective monitoring arrangement
- Inadequate management reporting escalation and accountability

It has previously been identified correctly that shared spaces have not been managed and that the Estates Coordinator was established to manage the areas. However, it has now become very evident that the scope of this role needs to be extended further to reduce the risk to the ateb group.

Recommendation

Facilities Management's "**purpose**" is the management integration and co-ordination of a number of support services that allows others in the organisation to achieve its overall objectives.

It is very clear that ateb is going through a period of growth especially in the compliance areas.

This growth now needs to be extended into the Facilities Management areas which is seriously neglected and will complement the good work already undertaken by the compliance team. This would enable the team to offer an effective and efficient facilities management service that not only makes the shared spaces safer and compliant but adds value to ateb as a housing provider.

Estates Co-Ordinator's role

Change title to Facilities Manager - Shared Services which more accurately reflects the role. This will give a strong, effective leadership model with clearly defined responsibilities.

Extend the role to include all Facilities Management contract management not currently under anyone's control with the appropriate levels of organisational authority to make the contracts more effective and efficient.

Extend the role to include the responsibility and accountability of legionella management of the shared areas.

Extend the role to include scheme facilities that would allow the scheme managers to focus on the customer.

Extend the role to include Asbestos Management annual inspections in the shared areas.

Facilities Assistants roles

It is proposed to restructure the current FAs role and create two new Facilities Officers roles which will focus on shared services

The following qualification will be required:

- **IOSH** managing safely Certificate
- Management of Legionella
- Asbestos Inspections
- Playground inspector certificate
- Fire door inspection.

The new roles will be enhanced to carry out H&S audits of all internal and external areas shared and communal spaces.

Create a new Facilities Administrator

With the additional responsibilities it is imperative that audit trails are maintained effectively. To enable this an office-based administrator will be required to ensure the correct processes are followed, schedules are created, and records kept. This role would work closely with the compliance team with the aim to integrate checks with the propeller software. The role would also facilitate and document contract management reviews.

Create a new Facilities Assistants Role

As the new Facilities Officers role will become more focused on a new and compliant H&S regime this will leave a gap with regards refuse collection. A new role will be created to focus on the refuse areas of the estate. This role will also assist with the cleaning at Meyler.

Cleaning Staff

It is proposed not to recruit for the vacant post and will result in 2 permanent cleaning staff plus the newly formed Facilities Assistant role which is sufficient for Meyler House.

Role Profiles

Due to the change in roles the current role profiles for the Estates Co-ordinator and Facilities Assistants will need to be resubmitted for revaluation.

The proposals above clearly reflect our Strategy aim “to Improve Service Delivery” and echoes our DNA to “deliver a great service to our customers, utilise our resources efficiently, develop ourselves and others.”

Name Pete Cleary PGdipFM
Job title Estates Coordinator

Transforming our Customer Services

Customer Directorate



ateb

*better living
solutions*

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- 9.0 Next steps
- 10.0 Summary

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- Directorate service Areas
- Improvement Plan
- Team Structure Charts

Introduction

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

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

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

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

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

Strategic Context

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



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

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

- #InYouWeTrust
- #AccessAllAreas
- #GetThingsDone

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

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

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

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

Finance

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

Process Mapping

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

SA/01 – Letting

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

SA/02 – Income Collection

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

SA/03 – Customer Advice & Support

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

- The team structure in terms of rotating tasks, role definition and capacity was identified as not being fit for purpose

SA/04 – Maintenance

- Processes were defined but required more detail regarding roles, responsibilities and escalation processes as this was unclear
- Total Mobile was working well but the lack of a scheduling system was identified as a concern. In addition Capita was costly and unreliable in term of support when wanting to make changes
- No dedicated back office resource for scheduling and other tasks was identified as a gap in the team structure, emphasised further by the lack of effective digital solutions.

SA/05 – Shared spaces management

- There were no clear or consistent processes in place for this service area
- There were no ICT systems being effectively used
- There was no dedicated staff resource and therefore a risk of poor service delivery and inconsistencies in approach. Senior management were very involved in day to day delivery

SA/06 – Compliance works

- There were no defined and detailed processes for this service area with the exception of gas safety
- There was a lack of ICT systems to manage a compliance program and a reliance on excel spread sheets
- There was no dedicated staff resource and roles and responsibilities across the business were unclear

SA/07 – Planned Improvement

- Processes were identified as requiring more work through engagement with relevant teams
- The need to review how this service area is delivered going forward was identified and needed to be considered as part of the Property Services review

SA/08 – Customer Engagement

- Processes were well defined following the rollout of the e2i initiative but not documented in any detail

- It was identified that there was a need to monitor and regularly review the effectiveness of e2i, specifically in relation to monitoring outcomes

SA/09 – Tenancy & Community management

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

SA/25 – Supported & Older Person Management

- Processes generally were well defined but not documented
- Access to ICT was an issue for the team who all worked remotely
- The departure of the Agency Manager in West Wales Care and Repair gave an opportunity to consider how we manage Older Persons support services across ateb

Having considered the service area outcomes and priorities to the business, we have reviewed the resourcing structure originally proposed as the team believe it will offer us the best opportunity to deliver our required service outcomes, efficiently with a great customer experience.

Directorate name

The team agreed that whereas all are ultimately responsible for customer contact and service, the Housing Directorate is our lead team when it comes to external customer contact. It was agreed that the team name should reflect this responsibility, therefore we are still proposing to change the directorate name from Housing to Customer Services to reinforce that we are a service-oriented organisation.

Directorate High level structure

It was agreed that to meet the SDP expectations, we need to have established the following requirements of the new Customer Services Directorate

1. **First Contact teams** – consisting of teams that will lead the first contact points with our customers across the majority of our key customer contact service areas
2. **Second Contact teams** – where teams will provide more specialist support and case managed service outcomes

3. **Maintenance and Compliance teams** – is our highest customer demand area and has a distinct technical under-taking to ensure it delivers on our outcomes.
4. **Engagement team**– working across all service areas, engagement will provide support to all teams on how to use our engagement initiative to best effect

Using the above and then applying to our teams we are proposing the following high-level structure to the Customer Services Directorate:

Customer Services Directorate				
First Contact Teams	Engagement	Second Contact Teams	Older Persons	Maintenance and Compliance Teams
1. Customer Contact team	3. Engagement team	4. Tenancy and Community team	6. Older Persons Support	8. Maintenance and Compliance team
2. Money Solutions team (inc. Digi Team)		5. Support and Older person team (housing)	7. West Wales Care and Repair	

Team Responsibilities and Changes

It was agreed that the above teams would have the following key responsibilities:

1. Customer Contact team

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

- SA/03 – Customer Advice & Support [across - Telephone, Web, Social media, Email, Reception, Ad hoc face to face]

With an objective of meeting customer service expectation at first point of contact in relation to the following service areas:

- SA/01 – Letting
- SA/02 – Income Collection
- SA/04 – Maintenance
- SA/05 – Shared Spaces management
- SA/06 – Compliance works

- SA/07 – Planned Improvement
- SA/08 – Customer Engagement
- SA/09 – Tenancy & Community management
- SA/25 – Supported & Older Person Management

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

- The Customer Service Advisor and Clerical Assistant roles are merged to create a team that is more flexible and adaptable to customer demands.
- The Filing and Archiving role is reviewed and expanded to a more generic Customer Services Administration Assistant role.
- The team will lead on office management functions e.g. post, stationary, sundries and role profiles will reflect this.
- x3 Customer Services Advisor positions are identified to lead on lettings, maintenance and compliance and will report into these service areas, rotating responsibilities will end.

2. Money Solutions team

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

- SA/02 – Income Collection

No changes are proposed to the structure of this team. The Digital Solutions team will sit within this team for a further 12 months as its current focus is to support our customers with the rollout of Universal Credit.

3. Engagement team

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

- SA/08 – Customer Engagement

No changes are proposed to the structure of this team. Job titles will be reviewed to reflect the broader changes.

4. Tenancy and Community team

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

- SA/01 – Letting
- SA/05 – Shared Spaces management

- SA/09 – Tenancy & Community management

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

- Geographical areas will be redefined into 5 areas
- An Estate and Services Manager role will be created to lead on Shared spaces management
- Facilities Assistants and Cleaners will report into this new role

5. Support and Older person team

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

- SA/25 – Supported & Older Person Management

It is proposed that the following changes are made to the structure of the team to achieve their objectives:

- The Older Persons support service will report into the West Wales Care and Repair Agency Manager role for a minimum of 2 years with regular review
- An Area Officer will be dedicated to Older Persons and Supported Living tenants across our area of operation to enable a more specialist and consistent approach in our delivery of the service
- We will need to monitor closely how we resource this area to ensure that the resources available are able to deliver an effective service

6. Maintenance and Compliance team

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

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

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

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

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

Working together

Whereas each team will take responsibility for managing particular service areas, all teams must work together and interact to ensure that the right service outcomes are delivered, efficiently with great customer experience.

Each service area will have a service hub. The service hubs will give transparency to all in respect of what is happening in each service area.

Next steps

- The outcome of the review will be presented to the teams within the Customer Directorate in during early August
- The outcome of the review will be communicated to the teams across the wider group by the end of August
- The outcome of the review will be presented to ateb Board in July
- The new Customer directorate will be launched to customers during September
- Work to implement the improvements identified in the transformational plan has already started. A working group will be established to monitor progress against the agreed actions that will meet regularly from September

Summary

ateb has set itself high expectations in terms of service delivery and must therefore resource its services effectively to ensure the right outcomes.

The review undertaken across the directorate has identified how we need to be resourced, the ICT solutions needed and the processes required.

Customer Services Directorate – Service Areas under management

Ref	Service Area name	Outcome	Scope of Service Area: [All resources, processes and systems required to deliver, monitor and improve the service area]	Service Start	Service Complete
SA/01	Letting	All properties let, all of the time	The letting of new and existing properties including all letting and void work required to let.	From handover of new homes or receipt of 28 days' notice to quit from tenant. When a property has been identified as void.	When the post-handover satisfaction review has been undertaken with all issues resolved.
SA/02	Income Collection	All rent collected on the due date.	Collect current rent on time together with chasing current and former arrears using accurate and relevant data.	New tenant – one month in advance. Existing tenant – one-week arrears.	When a property is removed from the rent role or all debt is paid/ written off.
SA/03	Customer Advice & Support	Help customers access advice and support they need.	Advice and assistance to make sure that customers have the best chance of sustaining their tenancy and have a great customer experience.	When an enquiry is raised about one of the service areas or insight suggests that there is a potential issue.	When the enquiry is resolved to the customers satisfaction or the organisation formally closes as it has become unresolvable.
SA/04	Maintenance	Fix issues to the customers satisfaction	The delivery of a repairs service in accordance with our tenancy terms and conditions and our Responsive Repairs Policy.	On the request or identification of a repair.	When repair completed to customer satisfaction
SA/05	Shared spaces Management	Our shared spaces are clean, well-kept and safe environments.	The identification, procurement, legislative management and delivery supervision of the service chargeable and other works programme resulting from the tenancy and owned land obligations.	Identification of service works requirement.	Service works no longer required.
SA/06	Compliance Works	All properties are compliant with the required regulations.	The identification, procurement, legislative management and delivery supervision of the compliancy works programmes relating to Gas, Electric, Fire, Asbestos, Legionella and Loler legislations.	2 months before a property is placed on the rent role.	When a property is removed from the organisations stock.
SA/07	Planned Improvement	Improvement programmes delivered to the customers satisfaction.	The delivery of a property improvement service in accordance with our Strategic Assessment Management Plan (AMP).	Annual Planned Improvement Programme taken from AMP.	When a property is removed from the organisations stock.
SA/08	Customer Engagement	That we improve service delivery through customer experiences.	The delivery of the Engage initiative and the management and implementation of actions following formal customer. The delivery of the Digi Project.	On-going.	On-going.
SA/09	Tenancy & Community Management	We have helped to create a great place to live	Case management relating to our tenancies, properties or estates. Introduction of new initiatives to enhance customer experience and promote wellbeing. Help maintain tenancies and enforce.	At the identification of a concern.	At the closure of a case and/or project.
SA/25	Supported Living	Promoting wellbeing of customers who require additional support.	The setting up, delivery and management of partnerships with specialist providers. The provision of support for older customers in schemes and wider community.	When a property is let through a partnership arrangement. When a customer moves into one of our schemes or when a customer requests to receive support.	When the partnership arrangement ends. When a customer no longer requires support.

Transforming our Customer Services

Customer Directorate Improvement Plan

The plan has been developed to take forward key work streams that have been identified through the process mapping exercises and time away with teams undertaken across the directorate.

Ref.	Service Area	Priority Description	Priority Actions	Timeframe and Lead
SA/01	Lettings	- Process mapping identified this area as needing a dedicated lead / team. - Process mapping identified that Rent to Own, shared ownership and Home Buy schemes have no dedicated resource. - Process mapping identified a need to refine our processes to ensure we are letting properties that are safe and of a good standard.	- We will regularly review the need to allocate a lead for this service area and budget plan accordingly for additional resource. - We will allocate a dedicated Customer Service Advisor (CSA) resource to lettings. - We will complete process maps for these schemes to understand better the resource requirements. - We will refine our lettings processes and review our customer starter information, specifically in relation to compliance.	Jane Robinson Quarterly Complete Jane Robinson 31st Oct. 2019 Jane Robinson 31st March 2020

Transforming our Customer Services

Customer Directorate Improvement Plan

SA/02	Income Collection	- Following the creation of the income collection team we want to ensure that there is a defined escalation process from Money Solutions Team to Tenancy and Community Management Team. - Process mapping and discussion with the team has identified that the failure to rollout Wakefield Project phase 2 and 3 has created additional workload in managing the rollout of Universal Credit. - The team identified a need to improve digital solutions for remote working and the need for off-site locations to meet our customers across the county.	- We will refine the process maps for this area to ensure roles and escalation processes are clear and provides the best possible service to our customers. - We will agree a short and long term solution to the rollout of phase 2 and 3 of the Wakefield project and negotiate an agreement to provide external support. - We will engage with the Digital Transformation project to ensure it enables improved remote working. - We will work with partner agencies across the county to identify opportunities for sharing meeting space.	Jayne O Hara 31st Dec. 2019 Jayne O Hara 31st August 2019 Jayne O Hara TBC Lee Bridges 31st March 2020
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Transforming our Customer Services

Customer Directorate Improvement Plan

		• Process mapping identified an emerging risk to an increase in arrears if we do not get the resourcing of the team correct. • The team identified a need for all ateb staff to understand the role they can have in collection of rent. • The team identified that improvements were required in the training provided for their roles. • The team identified the lack of support available with furniture and fittings for people in need. • The team identified the need to create opportunities to reflect and learn about the impact of Universal Credit (UC) rollout.	• We will regularly review the capacity and resourcing within the team and across ateb to ensure we have the resources to meet the challenges of Universal Credit (UC) rollout. • We will undertake workshops with teams across ateb to improve understanding of role we can all play in the collection of rent. • We will develop and rollout a Learning Pathway for the roles within the Money Solutions Team. • We will explore and implement options for supporting our customers in real hardship through better partnership working. • We will embed a working group that meets regularly to review and agree actions arising from UC rollout.	Jayne O Hara Quarterly Jayne O Hara 31st Dec. 2019 Lee Bridges 31st Dec. 2019 Lee Bridges 31st Dec. 2019 Jayne O Hara from Oct. 2019
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Transforming our Customer Services

Customer Directorate Improvement Plan

SA/03	Customer Advice and Support	- The team identified that there is a need to clarify when 1st point of contact should be escalated to 2nd stage and ensure availability of key staff for when something needs to be escalated. - Process mapping identified a need to review how the team is deployed to ensure that we can deliver on the service areas as defined in the Service Delivery Plan. - The team identified the need for a digital solution for Customer Relationship Management (CRM), to enable effective recording and sharing of customer contact. - The team identified that we are unable to measure and report our customer experience of the service we offer through 1st point of contact on the telephone, at reception and through social media. - The team identified a need to improve the information we provide to our customers on the service they can expect from us.	- We will refine our process maps and review our scripts. - We will work with our colleagues across the directorate to agree how we ensure the availability of key staff. - We will agree arrangements to deploy the team by x2 face to face, reception and general telephone enquiries; x1 Lettings; x1 Compliance; x1 Repairs; x4 1st point of contact telephone enquiries and x1 Administration support. - We will fully engage in the digital transformation project to explore and identify digital solutions for Customer Relationship Management (CRM). - We will aim to improve how we measure our customer experience of the service we offer through 1st point of contact on the telephone, digitally and at reception with better use of SMS and telephone automated surveys for gathering feedback from our customers. - We will review information we provide to our new customers through the customer starter pack and how we update our existing customers on changes.	Jane Nutland 30th Nov. 2019 Complete Jayne O Hara TBC Jane Nutland 31st Dec. 2019 Jane Nutland 31st March 2020
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Transforming our Customer Services

Customer Directorate Improvement Plan

		• Process mapping identified the need to have greater clarity of role purpose across the team whilst ensuring adaptability and flexibility. • The team identified the need for a channel shift from customers seeking advice through traditional means to greater use of social media. • Teams identified a lack of administrative support across the directorate. • The team identified that a significant amount of time is taken in dealing with non-customer telephone enquiries.	• We will clarify the Clerical Assistant and Customer Service Advisor role through the development of one Role Profile with the aim of having greater flexibility and adaptability across the team. • We will develop a strategy that aims to promote the use of social media, website etc. as a 1st point of contact option for our customers. We will continue to monitor and analyse how our customers prefer to have contact with us. • We will explore how we can best provide administrative support across the directorate through the review of role profiles and refining of process maps. • We will monitor and report on non-customer contact, and from the data collected develop a strategy to minimise impact of non-customer contact on delivering our service to our customers.	Complete Jayne O Hara 31st Dec. 2019 Jane Nutland 31st Dec. 2019 Jane Nutland 31st Dec. 2019
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Transforming our Customer Services

Customer Directorate Improvement Plan

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

Customer Directorate Improvement Plan

		- The team identified that a lack of Customer Service Advisor (CSA) resource lead to a lack of consistency and poor customer service. - The team identified that a lack of an effective scheduling system leads to an inefficient use of time. - The team identified that a process for raising concerns re customers and feedback after raising concerns was not in place. - The team identified that there was no resource for the disposal of rubbish from void properties. - The team identified a need to be more involved in the handover of new properties from development colleagues. - The departure of the Maintenance Supervisor provided an opportunity to review the team supervisory structure.	- We will identify a dedicated CSA lead for Maintenance. - We will fully engage in the digital transformation project to explore and identify digital solutions for scheduling works. - We will develop a process map for raising concerns that clearly identifies roles and responsibilities. - We will analyse demand and identify a solution to effectively resource. - We will work with our Property Services colleagues on the development of a process map for hand-over of new properties that identifies roles and responsibilities. - We will create and appoint to a Team Leader tier from within the existing team.	Complete Antony James 31st March 2020 Jane Robinson 31st Dec. 2019 Antony James 31st Dec. 2019 Antony James 31st Dec. 2019 30th Nov. 2019
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Transforming our Customer Services

Customer Directorate Improvement Plan

SA/05	Shared Spaces Management	Process mapping identified a lack of effective processes and resource in this service area.	- We will appoint a dedicated resource to lead this service area. We will review the team structure and prioritise improvements in H&S checks. - We will develop systems and process maps for this service area on the appointment of a dedicated resource, and agree further improvements required.	Jane Robinson 30th Nov. 2019 Jane Robinson 31st January 2020
SA/06	Compliance Works	- Process mapping identified a significant lack of processes and systems that would ensure compliance. - Process mapping identified a lack of clarity regarding roles and responsibilities across the business.	- We will develop process maps and implement new systems. - We will embed a new team and clarify roles and responsibilities across the business through the development of process maps. - We will develop a detailed action plan that aims to ensure we meet all our compliance obligations.	See detailed action plan.
SA/07	Planned Improvements	- The teams identified that we would like to improve communication channels between Housing and Property Services colleagues to improve our service offer to our customers. - The team identified a need to review how we resource and structure the delivery of a planned maintenance service.	- We will develop a communication plan that will be agreed and implemented. - We will work and engage with our Property Services colleagues during their “Delivering our service outcomes” review.	Antony James 31st Dec. 2019 Antony James Autumn 2019

Transforming our Customer Services

Customer Directorate Improvement Plan

SA/08	Customer Engagement	- We have reviewed the Tenants Panel and approach to Quality Assurance with our tenants but want to increase representation of our customers. - E2I has been in place for 1 year and we want to understand if it is having the desired impact on our service to our customers.	- We will work with our customers on embedding the changes to a new Customer Forum. We will conduct a review with customers after 12 months. - We will develop a role profile for customers who want to be involved in Quality Assurance and advertise. We will consider potential options for payment in kind. - We will undertake a review/audit of E2I and implement any recommendations for improvement. - We will develop our process maps for Customer Engagement.	Ailnor Evans March 2020 Ailnor Evans January 2020 Ailnor Evans 31st March 2020 Ailnor Evans 31st Dec. 2019
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Transforming our Customer Services

Customer Directorate Improvement Plan

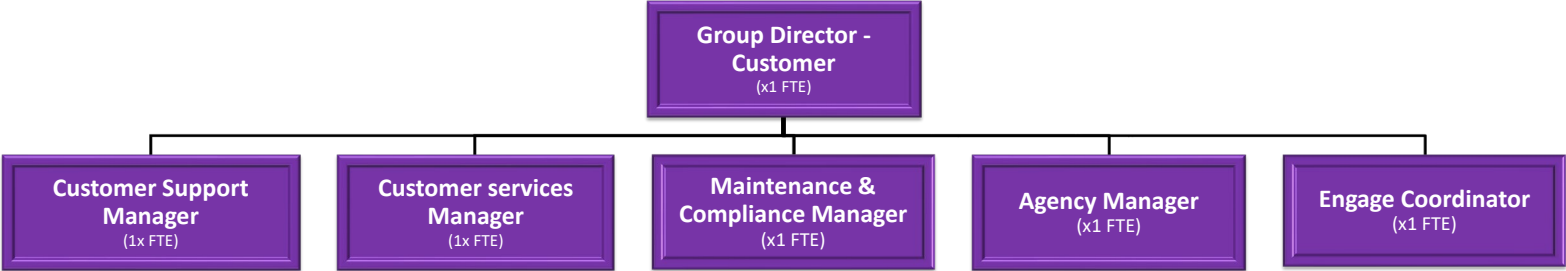
SA/09	Tenancy and Community Management	• Process mapping identified a lack of clarity and understanding of this service area. • The team identified that the creation of a dedicated resource for shared spaces results in a need to review how this area is resourced. • The team identified that customers need to understand the role and purpose of Area Officers and all the changes that have and are proposed to be made. • The team identified that there is currently no agreed approach to case management, how we identify, monitor and engage. • The team identified a need to review how Housing Plus budgets are set and used.	• We will develop a “to be” process maps for this service area. • We will develop a role profile for the Area Officer that will clarify the role and responsibilities. • We will define x4 geographical areas and x1 Older Person and Supported Living area. We will monitor the resourcing of this area as the business grows. • We will communicate in writing to all customers as part of launch. We will improve information on web site. • We will research and agree the best approach e.g. restorative practice. • We will implement the new approach and monitor impact. • We will develop and pilot a scheme that is customer led and where Housing Plus budgets are used to enhance communities.	Jane Robinson 31st Dec. 2019 Complete Complete Mark Lewis 30th Nov. 2019 Jane Robinson 31st Jan. 2020 Jane Robinson From 1st Oct. 2020 Jane Robinson From 1st April 2020
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Transforming our Customer Services

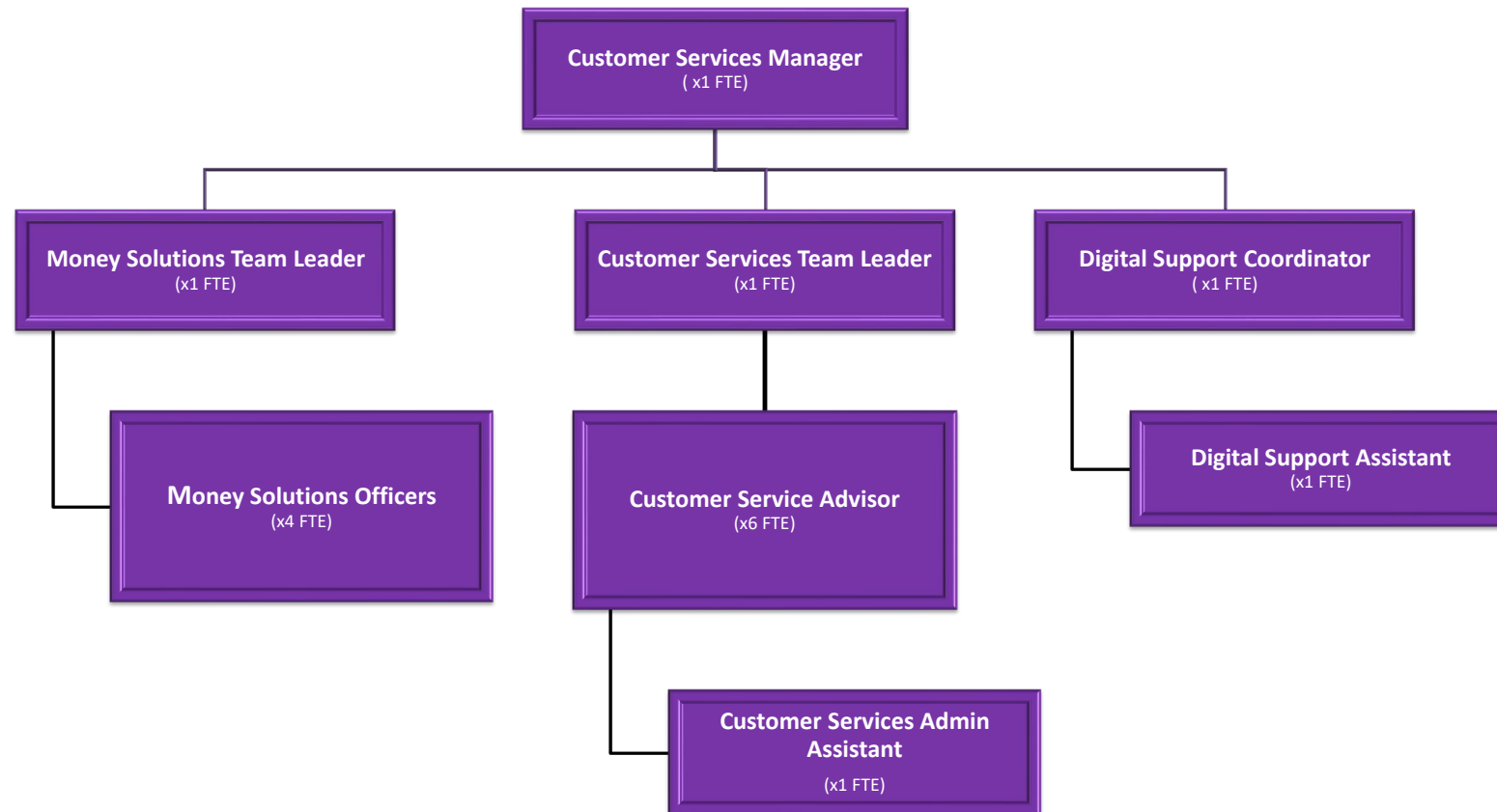
Customer Directorate Improvement Plan

SA/25	Supported and Older Persons Management	- The team identified that Management Agreements with partners need review. - The team identified that communication where repairs are reported needs to be improved. - The team identified that Support paperwork and Health and Safety checks is resource heavy. - The team identified that how we engage tenants re. planned works needs to be improved. - The team identified that it would be beneficial to be more involved in lettings process. - It was identified that how the team is resourced may not be fit for future growth and service development.	- We will carry out a review of management agreements and agree changes as part of the annual review process, particularly compliance. - We will refine the process maps for repairs and agree changes with team that ensures communication is improved. - We will refine process maps to better understand resources demands. - We will work with our Property Services colleagues on developing a process that ensures the best outcome for our tenants. - We will refine the lettings process to ensure that roles and responsibilities are agreed and defined. - We will create 1 senior lead across WWCR and ateb Older Persons services on a temporary basis and review impact. - We will regularly monitor and review how we resource this area of our business	Jayne O Hara 31st Oct. 2019 Antony James 30th Nov. 2019 Jayne O Hara 31st Oct. 2019 Jayne O Hara 31st March 2020 Jane Robinson 31st Oct. 2019 Complete Quarterly
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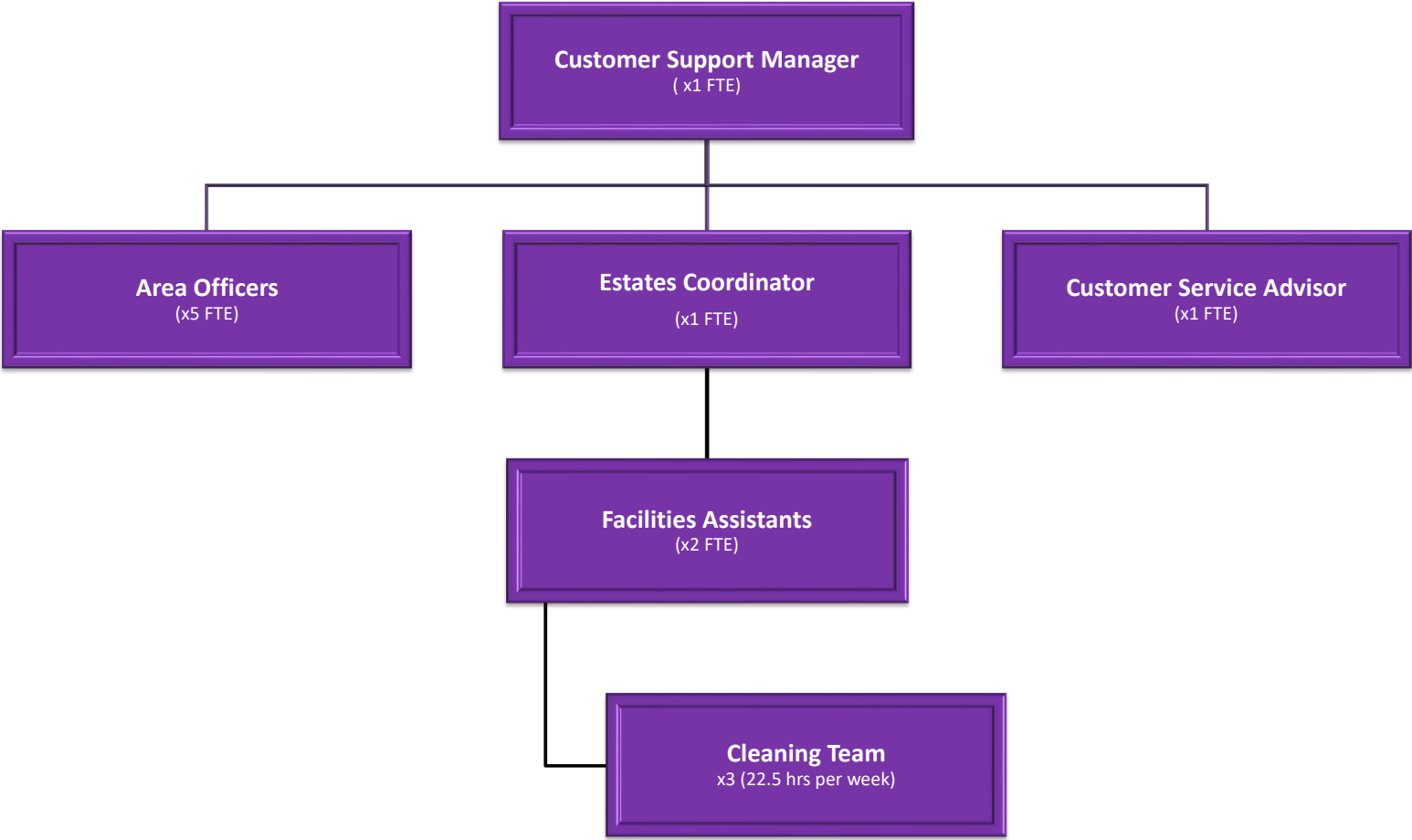
Customer Directorate



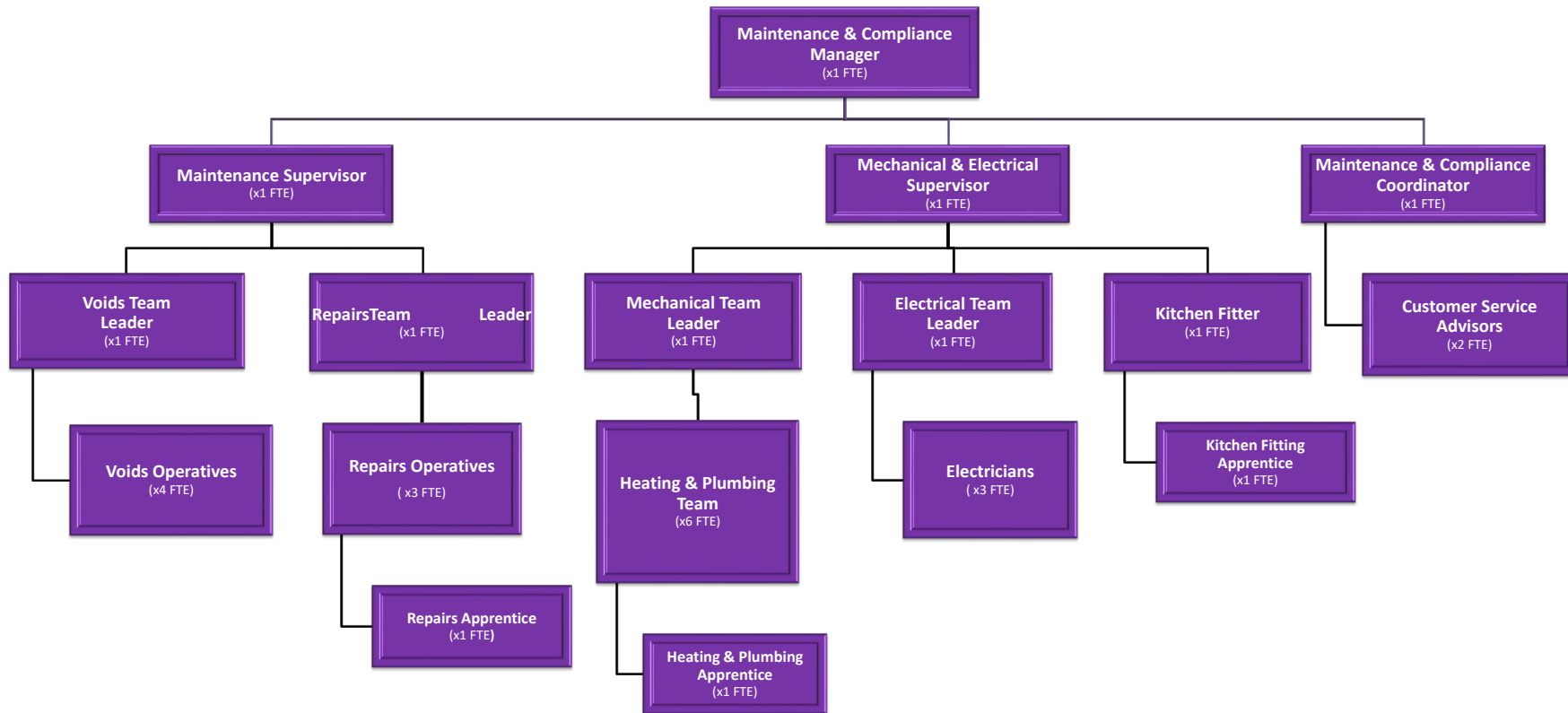
Customer Services Team



Customer Support Team

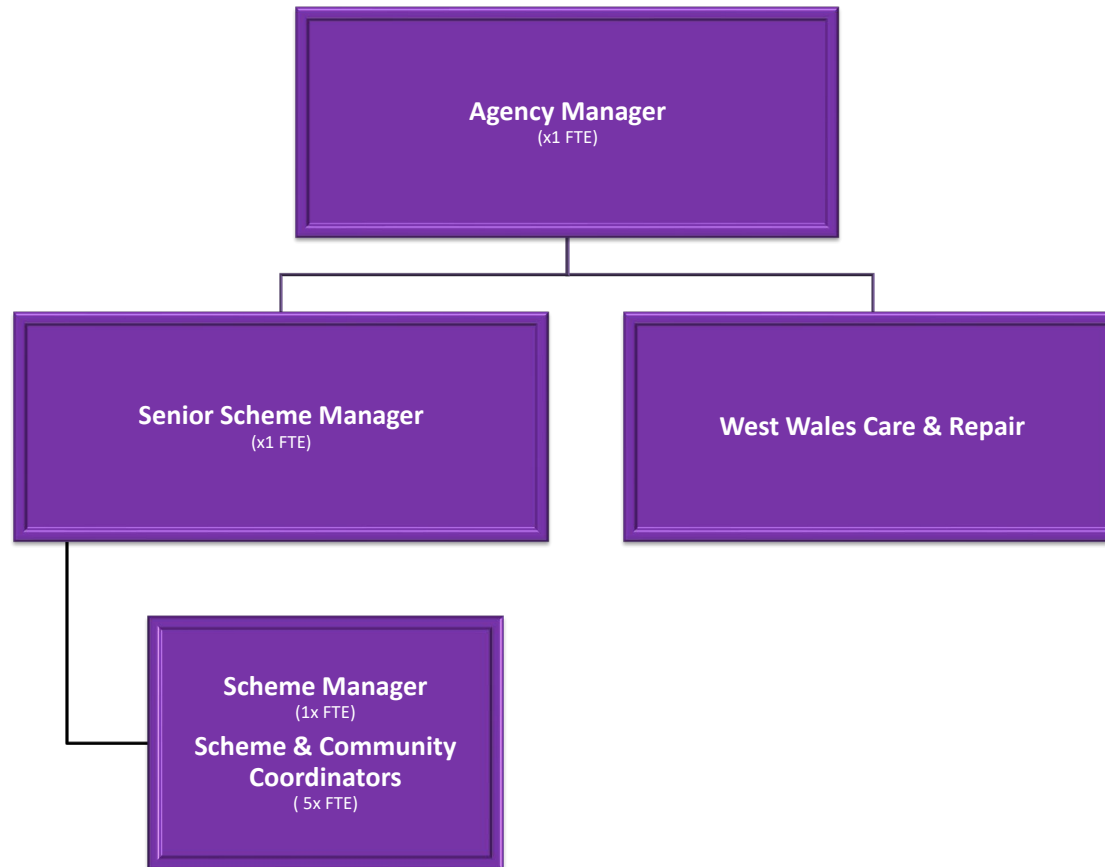


Maintenance and Compliance Team



* Applications invited from within the teams.

West Wales Care Repair and Older Persons Services



#4 Deliver

How we will deliver a great service





Contents

4/ Introduction

5/ Value for Money

6/ VFM – Our Definition

7/ VFM – Optimum Service Delivery

8/ Service Delivery Plan

9/ Service Hubs

10/ Customers At The Heart Of Our Service Delivery

11/ Service Expectations

12/ Service Processes

13/ Service Reviews

14/ Service Delivery Report

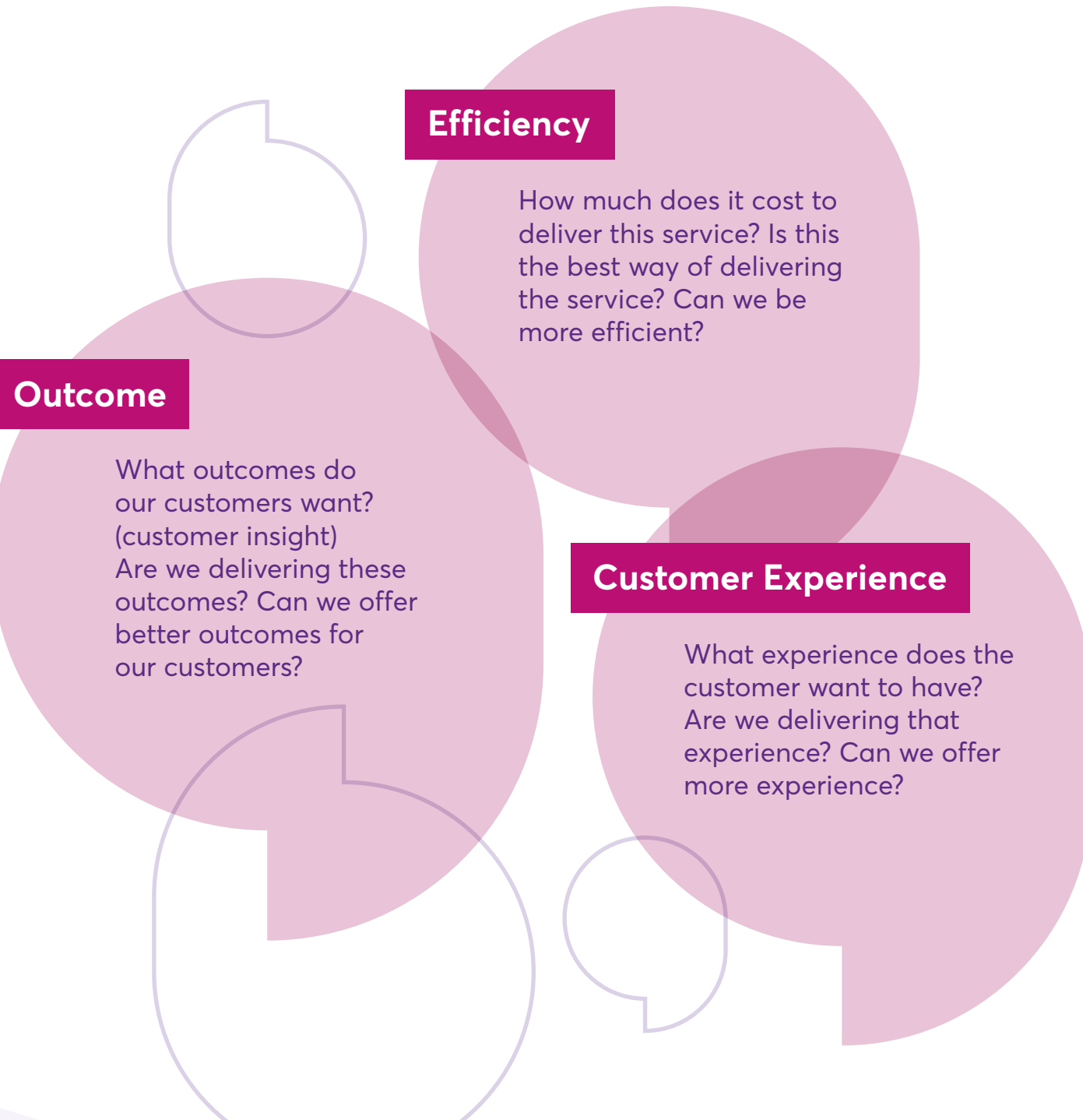
15/ Summary



VFM – Our Definition

Key to our approach for service delivery and achieving Value for Money is our ability to know and understand our customer demand.

We have termed customer demand as the service **'Outcome'**. Creating close relationships with our customers through a range of channels will enable us to make sure our services do what **"... it says on the tin"**. In delivering the right outcome we also need to make sure we are efficient. To know if we are efficient, we need to know two things, firstly the cost of providing the service and secondly how our processes allocate and use resources. By analysing these two factors we will be able to draw conclusions on our **'Efficiency'**. The third component of our Value for Money approach is **'Customer Experience'**, where we want to make sure every customer has a good experience from the interaction with ateb.





Value For Money – Optimum Service Delivery

To know if our services are Value For Money we must have measures to monitor whether we are **achieving the right outcomes**, efficiently with great customer experience i.e.

$$\text{Optimum Delivery [Our Value for Money aspiration]} = 100\% \text{ of the Right Outcome} + 100\% \text{ Delivery Efficiency} + 100\% \text{ Customer Experience Satisfaction}$$

1/ We must set the right types of measures to understand each services performance.

2/ Having set and collected the right measures we will then need to understand what they telling us.

3/ With the right analysis we will then be able to make the right changes to our services.

Measure Category	The purpose of measures agreed in this category are:
Outcomes	To establish whether we are achieving our stated service outcome
Efficiency	To understand the cost of providing the service outcomes
Customer	To gauge whether our customers are satisfied with the way we are delivering the service outcomes

The measures will be used to analyse whether we:
1/ Have the right outcomes?
2/ Have the right processes?
3/ Are procuring the right resources?
4/ Are allocating or using the right resources?
5/ Can deliver more outcome and/or customer experience whilst reducing or maintaining our costs?

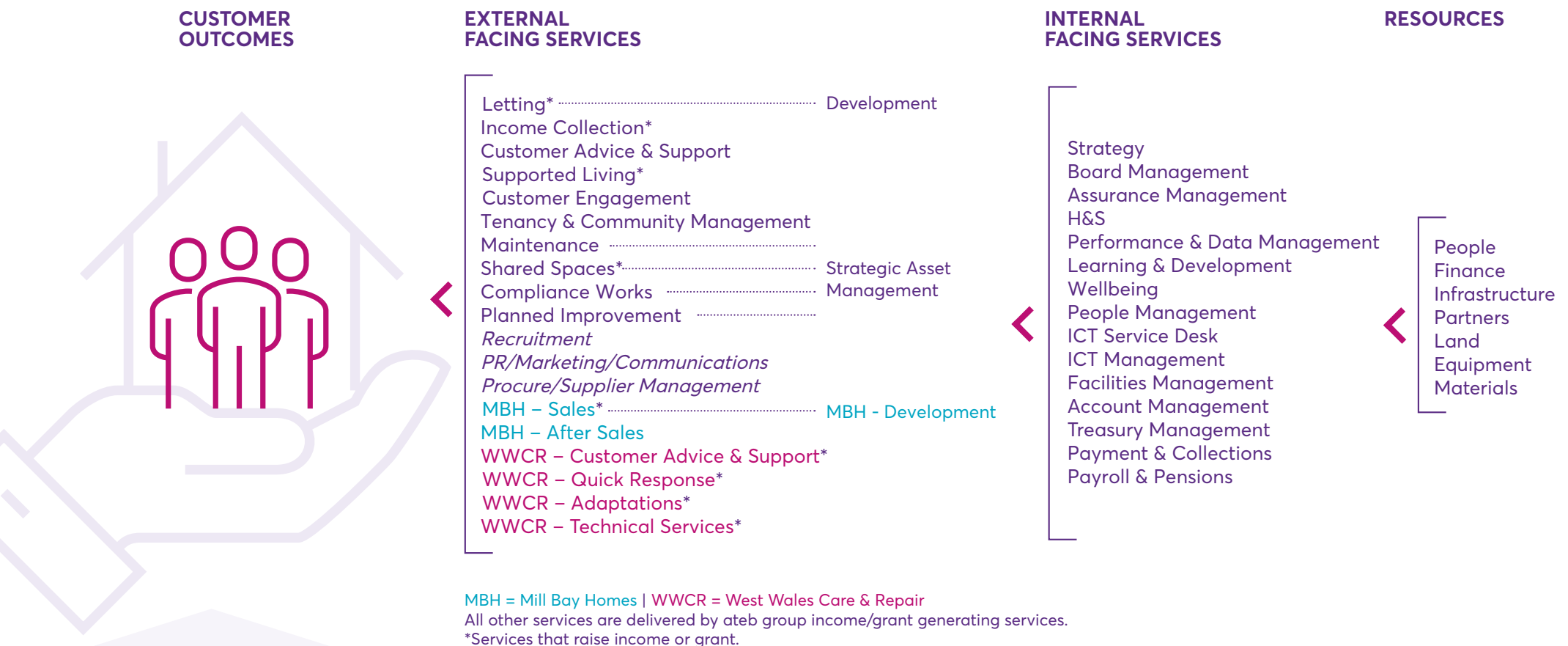
The analysis of the measures could lead to:
1/ Changes to the service outcome
2/ An improvement action to deliver more outcome and/or more efficiency and/or more customer experience
3/ Add or remove service areas



Service Delivery Plan

The Service Delivery Plan – the processes and resources that deliver our customer outcomes.

These are our 37 service areas, please see APPENDIX A for the definition of each area. All our service areas support our customer outcomes, some are directly seen/experienced by our customers (external facing) and others support customer service (internal facing)





Service Hubs

Our service hubs will embed all aspects of our operations directly into our delivery teams. Each hub will capture standard information such as internal audit recommendations, policies and processes and improvement actions.

The hubs will show us what is required to make each service great and our role profile and achieve frameworks will reinforce where each can make the difference to a service.

The service hubs will be located in a cloud environment allowing all our teams to access their service information at any time. As the hubs will use standard formatted pages, collating company wide information such as H&S performance will be possible.

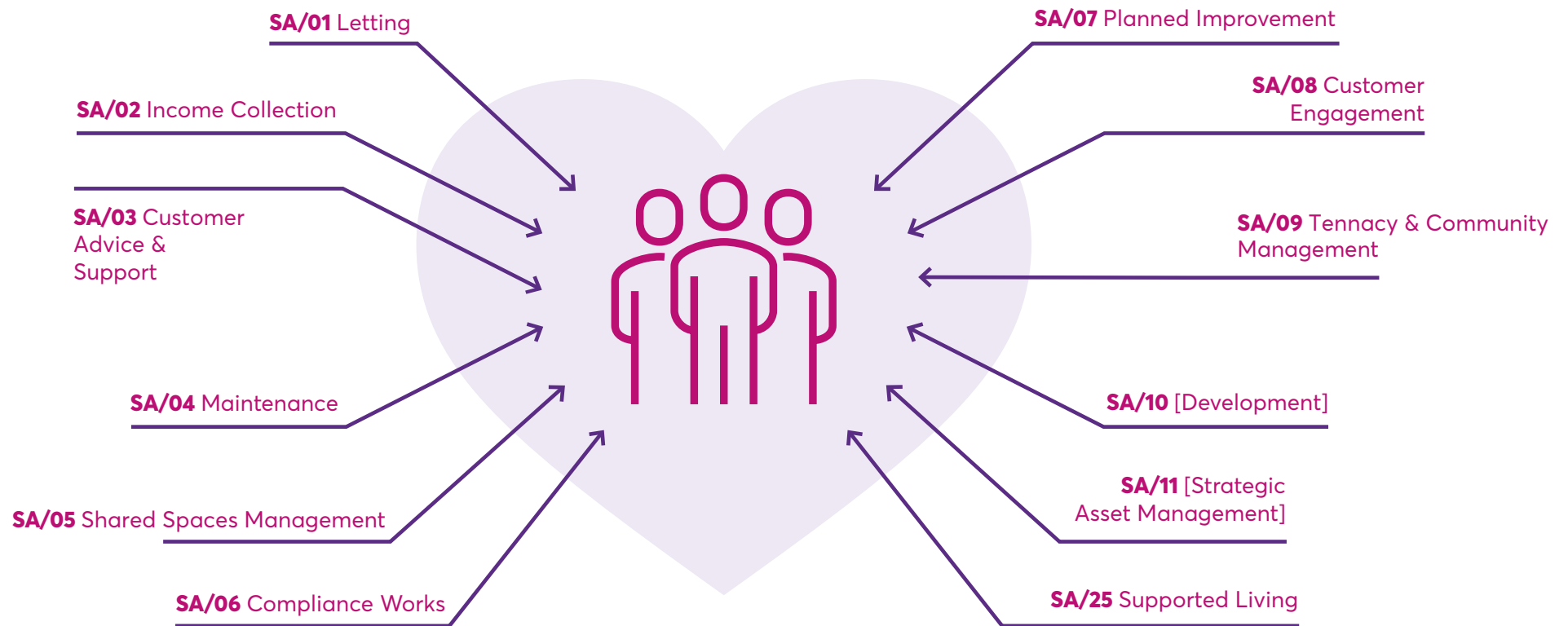
The service hubs are owned by their teams and managed by the Service Delivery Group. ateb will use the e2i team to help understand the required customer service outcomes and customer experience to create the right service improvement actions.





Customers At The Heart Of Our Service Delivery

The **Engage Initiative** will require the service teams to work with the e2i group to make sure that tenant insight is used to drive improvement within their service area; e2i will be primarily working with the following service areas:



Our delivery teams and e2i will monitor the improvements we make.

MBH and WWCR will involve their customers in a similar way.



Service Expectations

ateb aspires to providing simple effective solutions for its customers' service needs.

To do this we will commit to organising our services in a way that allows our customers to access a high percentage of their needs at their first point of contact, where we can't resolve at first contact, we will then case manage the enquiry through a more specialist team. This approach directly supports our DNA ambition to **#GetThingsDone**. Our leading satisfaction test will ask whether we met a customers expectations and what we would have to do to exceed their expectations. This will require each delivery team to develop approaches to manage customer expectation.





(Ext) – External facing service
 (Int) – Internal facing service
 (Income) – Income or grant generating service

APPENDIX A: The Service Delivery Plan in more detail:

Ref	Service Area Name	Outcome	Scope Of Service Area: [All resources, processes and systems required to deliver, monitor and improve the service area]	Service Start	Service Complete
SA/11	Strategic Asset Management (Int)	Maximise our asset investment.	Stock condition and appraisal, investment programme management. WHQS regulatory compliance, option appraisal process.	On-going.	On-going.
SA/12	Recruitment (Ext)	Attract & retain the right talent.	Support the identification of skills, develop and implement a recruitment process, ensure legislative compliance, monitor recruitment to ensure process is effective.	Where a recruitment need is identified.	On satisfactory completion of the induction programme.
SA/13	Learn & Development (Ext)	Equipping our people to deliver a better service.	Support identification of learning needs related to service delivery improvement, procure learning solutions, monitor learning solutions, implement corporate development programmes.	New person is employed.	Employee leaves the organisation.
SA/14	Wellbeing (Int)	Ensure our people are mentally, physically & emotionally healthy to enable them to realise their potential.	Identify and implement support programmes for teams. Embed wellbeing principles throughout the organisation.	On-going.	On-going.
SA/15	People Management (Int)	Highly motivated & innovative team culture.	Develop and implement systems to ensure we meet employment legislation requirements and our DNA and leadership expectations.	New person is employed.	Employee leaves the organisation.
SA/16	Board Management (Int)	Governance meets the required regulatory requirements.	Plan and implement Board organisation, training, reporting and recruiting.	On-going.	On-going.
SA/17	Strategy (Int)	Clarity on how we will maximise our purpose.	Development of purpose, strategic analysis, set strategic 3 year priorities, embed strategic plan through organisation, monitor strategic performance, adjust priorities over 3 year life of the strategic plan.	6 months prior to the introduction of a new 3 year strategic plan.	2 months post the introduction of a new 3 year strategic plan.
SA/18	Assurance Management (Int)	To be assured we are doing the right things	Identify our regulation, risk and assurance framework. Develop and report risk register. Develop and monitor assurance controls and tests. Embed assurance management in service delivery.	On-going.	On-going.
SA/19	H&S (Int)	We meet our legislative & regulatory H&S requirements.	Establish organisations H&S requirements; develop systems to make sure we are compliant. Embed H&S culture and systems throughout the organisation. Monitor H&S performance and report instances of H&S breach as required.	On-going.	On-going.
SA/20	PR/Marketing & Communications (Int & Ext)	Positive growth of our brand. The right messages to the right audience at the right time.	Plan and implement programmes of PR and marketing aimed at promoting our key messages to the public, customers and key partners and suppliers. Support the implementation of the Share initiative Develop and implement internal and external communication networks to disseminate the organisations key messages to our external customers and internal colleague teams. Support the implementation of the Involve and engage initiatives.	On-going.	On-going.

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

Hi Jo and Kate,

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

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

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

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

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

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

Kind regards,

Jane Nutland
Customer Services Coordinator

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ATEB GROUP GROUPS +

People & Communica...

Sheltered And Extra C...

E2i

ateb Induction

i2i

ICT

ateb VISION and sup...

Wellbeing

Dot.e

Adaptable Workplace...

Workspace & Environ...

All Company 3

+ Create a group

Discover more groups

PRIVATE MESSAGES +

Coronavirus (COVID-19)

www.nhs.uk

Started February 27 at 1:42 PM

VIEW FULL CONVERSATION

 Ailnor Evans – March 19 at 10:05 AM

To E2i

Due to the COVID-19 situation, all e2i activities are currently postponed or cancelled; this includes the bi-monthly requests for feedback from customers, all groups, meetings and forums and all community events including the Big Day Out. Engage is temporarily transformed into The Welfare Team, who's purpose is to co-ordinate and help our customers through this period. Should you know of anyone who is in need of help due to the COVID-19 situation, or any local groups or professional companies who are offering help, please let us know. #weareateb Thank you, Ali

Started March 19 at 10:05 AM

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1 reply · Last reply March 25 at 2:08 PM

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 Victoria Evans – March 16 at 4:57 PM

To All Company

Coronavirus Update

This morning saw the first meeting of our COVID – 19 planning team; we will be meeting every morning to assess the latest Government advice and how this impacts on the services we provide to our customers and of course on how it impacts on our teams.

A few things to update you on:

Ø Please do not use De Clare Court and Kensington Court for any meetings with immediate effect.

Ø We have removed the logging in tablet at reception so please use your app or computer to log in



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Started March 16 at 4:57 PM

VIEW FULL CONVERSATION

VE

Victoria Evans

— March 5 at 12:32 PM

To All Company

Coronavirus (COVID-19)

Please find below some information in relation to coronavirus. We are sharing this information with you not to raise alarm or concern, but to ensure that you are directed to up to date Government information on the virus and for you to know that ateb, as a responsible employer and landlord, is taking all necessary steps to prepare for any potential increase in the spread of the virus. We are doing this as part of our ongoing contingency planning which covers extreme



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To All Company

Nick



WLM 8-4-20
All Company > Files

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better living solutions

Line Managers Update

08/04/2020

PDF

Weekly Line Managers
update - 8-4-20
All Company > Files

Started April 8 at 10:36 AM

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All Company

NH

Nick Hampshire – April 24 at 4:36 PM

Hi all

Update this week concentrates on the budgets agreed by the 3 ateb group Boards. Keep going everyone, I know our customers will appreciate the help and support we are offering even in these difficult times!

Nick

 ateb New budgets for FY 20/21

ateb Budget Communication

ateb New budgets for FY 20/21

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

PDF

ateb Budget Communication



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All Company



Nick Hampshire – May 1 at 4:18 PM

EMERGENCY PERFORMANCE REPORT

Please find attached the key performance measures we are tracking whilst operating under Business Continuity measures. Income & Expenditure, core services and compliance are the key areas of our focus over the coming weeks. Hopefully we can start planning for some form of recovery soon, but to get to that point we must remain vigilant that we remain within safe operating boundaries.

Nick



PRIVATE MESSAGES +

ateb Budget
Communication

Statement of Main Terms & Conditions of Employment

EV. 16

The Group/we/us/ organisation	ateb group limited
Name and address	Kate Houston. 83 Glebelands, Hakin, Milford Haven, Pembrokeshire, SA73 3QU.
Post title	People Advisor. See clause 2.
Department	People and Communications.
Location	Your usual place of work will be: Meyler House, St Thomas' Green, Haverfordwest, Pembrokeshire, SA61 1QP, however you may occasionally be required to work at any other business premises of the Employer or its customers/suppliers within a reasonable daily commuting distance from your home place of work.
Salary	£25,542 per annum. See clause 4.
Hours	Your weekly hours of work will be 37 hours over 5 days. See clause 5.
Continuous employment:	01 September 2003
Start date	01 December 2019
Annual leave	The annual leave year runs from 1st January to 31st December. Your annual entitlement is 30 days. In addition to this you will receive 8 bank/public holidays plus 3 additional days to be taken as advised by the Group. The timing of the 3 extra days is entirely at the discretion of the Group. Your entitlement will be pro-rated according to the number of hours you work. Please see clause 6.
Additional payments	N/A
Probationary period	N/A
Uniform	You are not required to wear a uniform whilst undertaking your duties.
Driving Licence	You are not required to hold a valid driving licence for your employment.

The Group offers employment on the terms and conditions set out in this Contract and subject to receipt of satisfactory references/clearances, evidence of eligibility to work in the UK and evidence of appropriate qualifications [including an appropriate, clean driving licence].

Acceptance

This document and written acceptance will constitute your contract of employment. If you agree to accept the appointment on the terms specified, you should sign one copy of this contract in the space provided at the bottom of this page and return to People & Communications. Copies of your contract and the reference documents referred to within it, will be available for inspection at all reasonable times in the People & Communications Department and are available on the Group's intranet site. You agree to familiarise yourself and comply with these documents and any policies and procedures issued by us from time to time.

Signed on behalf of the group (Nick Hampshire, Group Chief Executive):

_____ Date: ____ / ____ / ____

Signed – (Kate Houston - People Advisor):

_____ Date: ____ / ____ / ____

There are no collective agreements affecting your terms and conditions of employment. Any changes or amendments to your terms and conditions will be confirmed in writing within one month of them occurring.

1/ Continuous Employment

Your employment in this post will commence on the start date detailed above and any continuous period of employment with the Group is detailed above. Your continuous previous service will be recognised as reckonable service in respect of redundancy, maternity, sick pay and annual leave.

2/ Post Title

You must undertake all duties associated with your post title and you may be required to undertake any additional or other duties in other departments according to the needs of the Group from time to time.

During your employment with us you must devote the whole of your working time and attention to the performance of your duties and you must not work for any other business or company without our prior consent, which will not be unreasonably withheld.

3/ Period of Notice

After 1 month but under 6 months' service you are required to give the Group 1 week's notice to terminate your employment. Thereafter you are required to give 1 month's notice.

You are entitled to receive the following periods of notice from the Group:

Over 1 month but under 6 months' service – 1 week

Over 6 months' but under 5 years' service – 1 month

Over 5 years' continuous service – 1 week for each complete year of service to a maximum of 12 weeks after 12 years.

These arrangements shall not prevent:

- a.** The employee or the Group from giving or agreeing to give, a longer period of notice than the minimum;
- b.** Either party agreeing to waive notice, or accepting payment in lieu of it; or
- c.** The Group treating the contract as terminable without notice by reason of gross misconduct by the employee.

During your notice period, the Group may require you to perform reasonable duties not within your normal duties or special projects or may require you not to attend for work during the period of notice. So long as you are not required to attend for work you will remain an employee of the Group and will continue to receive your basic salary and be bound by all terms of this Contract including those obligations in respect of confidentiality.

You will not contact any employees, tenants or clients without the prior consent of the Group. You will not without the prior consent of your manager commence employment for any other employer. This is deemed to be gardening leave.

4/ Pay

You will be paid by BACS at monthly intervals on the 28th of every month (except for December when alternative arrangements are put in place and when the 28th falls at a weekend when your pay will be paid into your bank or building society on the proceeding Friday). The Group has the right to deduct from your pay, or otherwise to require repayment by other means, any sum which you owe to the Group, including, without limitation, any overpayment of pay or expenses, unauthorised absences from work, loans made to you by the Group, the cost of replacing any unreturned property or of repairing any damage or loss to our property or tenants' property caused by negligence or breach of duty by you, or any other item identified in this Statement and/or the Working @ateb as being repayable by you to the Group.

5/ Hours of Work

You are required to work the hours set out on page 1 of this document. In addition to these hours, you are required to work any additional hours necessary to fulfil the requirements of your position subject to the @ateb leading principle being met "We must always put the customer, business, team and H&S first when planning and delivering our role profile and responsibilities and service area outcomes". As provided for by the Working Time Regulations 1998 you will not be required to work in excess of 48 hours in any week measured over the applicable reference period.

6/ Holiday Entitlement

The holiday year runs from 1st January to 31st December and holiday may be taken at such times as your Manager reasonably approves.

Annual holiday entitlement is 30 days per annum. In addition to this you will receive 8 public holidays (paid at normal salary) plus 3 additional days, the timing of which is entirely at the discretion of the Group. Given the nature of the business it will sometimes be necessary for you to work on bank/public holidays but you will receive time off in lieu for this (this excludes work done on call and standby).

Entitlements shown are for a full time member of staff, part time staff will receive a pro-rata entitlement to both holiday entitlement and to general public holidays. Depending on their working arrangements staff may receive their holiday entitlement, including entitlement to public holidays, calculated as a total entitlement in hours.

You will accrue holiday on the basis of 1/12th of the annual entitlement for each complete month of service in the holiday year. When a post is terminated any payment for excess leave taken will be recovered by the Group. This payment will be deducted from any final salary payment made to you.

Further details of the conditions relating to holidays and the notice that you are required to give before taking annual leave are set out in the Group's Annual Leave & Special Leave Procedure.

7/ Sick Pay

Notification of absence due to sickness or injury must follow the procedure set out in the Group's Absence Management Procedure. You are required to produce a self-certificate on the 1st day of absence up to and including seven days. On return from sick leave you will be required to meet with your manager for a return to work discussion in accordance with the Group's Absence Management Procedure. A medical certificate will be required in respect of absences of more than seven days. A failure to follow these procedures may result in your absence being unpaid.

You agree to consent to a medical examination should we require. These will be arranged through the Group's Medical Advisor. You agree that any report produced in connection with such examination may be disclosed to us and we may discuss the contents with the Group's Medical Advisor.

We will pay you statutory sick pay (SSP) provided that you satisfy the relevant requirements.

You may be entitled to the Group's sick leave and pay, subject to correct notification and certification of absence in accordance with our policies and procedures as follows:

Length of Service	Sickness Entitlement
One month or less	None (although if you are eligible you are entitled to Statutory Sick Pay)
Less than 6 months service	1 month full pay 1 month half pay
After 6 months service	3 months full pay 3 months half pay (+ 3 months half pay if off long term due to critical illness as defined by group)

8/ Disciplinary Procedure

The Group's Rules and the procedure are shown in the Group's Disciplinary Procedure and are not contractual. It is your responsibility to familiarise yourself with these. If you are dissatisfied with any disciplinary decision taken against you, you should appeal in accordance with the appeals procedure as detailed within the Group's Disciplinary Procedure.

You may be suspended on full pay in order to carry out an investigation into alleged misconduct; you will be told the reasons why and provided with an indication as to how long it is likely to continue.

9/ Grievance Procedure

If you wish to raise any grievance relating to your employment, you should do so initially with your Line Manager and if not resolved in accordance with the Group's Grievance Procedures. The grievance procedure is not contractual.

10/ Pension

The Group will comply with the employer pension duties in respect of the Employee in accordance with Part 1 of the Pensions Act 2008.

The Group currently participates in an occupational pension scheme. The Employee will become an active member of the Defined Contribution Section of the Social Housing Pension Scheme (the Scheme) (or such other registered pension scheme as may be established by the Group to replace the Scheme) from the effective date of this contract subject to the eligibility criteria in Part 1 of the

Pensions Act 2008, the rules of the Scheme and tax reliefs and exemptions available from HM Revenue and Customs, in all cases as amended from time to time. Full details of the scheme are available from the – Finance Officer.

11/ Health & Safety

You are reminded that, in accordance with the Health & Safety at Work Act 1974, and subsequent legislation, you have a duty to take reasonable care to avoid injury to yourself and to others by your work activities, and you are required to co-operate with the Group in meeting statutory requirements. As an employee of the Group you are obliged to attend and participate in Group health and safety training identified as relevant to your work. All accidents sustained at work must be reported in accordance with the incident reporting procedures.

12/ Loss or Damage to Personal Belongings

No liability can be accepted for loss or damage to personal belongings on the Group's premises by burglary, fire, theft or otherwise. You are therefore advised to insure against all such risks.

13/ Duty of Confidentiality and Data Protection

In the course of your duties you may acquire or have access to confidential and sensitive information which should not be disclosed to any other person (either during or after your employment) unless in the pursuit of your duties or with specific permission given on behalf of the Group or the individual concerned where the information is sensitive in nature.

Confidential Information includes information about the Group, affairs, finances or future development plans of the Group or any of its clients or tenants including, without limitation, all information relating to the identity and affairs of its tenants, or about any other matters which may come to your knowledge in the course of your employment. For the avoidance of doubt, this includes any details, personal or otherwise, about the affairs of our tenants, staff, customers and business activities. Confidential information means any information or matter which is not in the public domain. This clause does not prevent you from making a protected disclosure or to prevent you from using or disclosing information as required by your employment or by law.

The Group has developed guidelines, which are set out in its Data Protection Procedure (Employees) and Data Protection Policy, for the processing of personal data to meet the requirements of current legislation; the Group may change these guidelines at any time at its discretion. You have the right to be informed about the collection and use of any personal data being held about you. The Group will keep personal information on you and disclose such information only on a need to know basis as and when required in accordance with legal framework. In addition the Group may take photographs of you at charity, corporate or public events and will use these (until you withdraw your consent) in corporate documents, and for marketing and publicity purposes e.g, Facebook, website (This may reach recipients outside the EEA - European Economic Area). In signing this Statement you expressly consent to the processing of these images and the information which is held about yourself, including sensitive data such as sickness and health records, ethnic origin and trade union membership/non-membership. Any processing and the reason for this of this sensitive data will be discussed with you.

We will regularly review, and where necessary update your privacy information. We will bring any new use of an individual's personal data to your attention before we start processing.

Data processing will take place in accordance with the Privacy notice, which can be found on the group website.

14/ Driving

If your post requires you to drive you must possess and produce on request a valid, current, full driving licence and any penalty points on your licence must be declared. Your certificate of motor

insurance must show that you are covered for any official business mileage. These documents will be checked on an annual basis. Failure to provide these documents will result in your essential car user allowance being withheld/withdrawn and disciplinary action being taken, including dismissal. If you are convicted of any traffic offence, you must report it to People & Communications immediately who will advise on any appropriate action.

You will be required to pay for any speeding fines or parking penalties incurred during your duties. Failure to comply with any of our policies regarding vehicles may result in disciplinary action, including dismissal.

15/ Contact Outside of Working Hours

During the course of your employment it may be necessary in certain circumstances to contact you at home. In the acceptance of this Contract of Employment you agree that your line manager or his/her representative may contact you at home by telephone without contravening your right under Article 8 of the Human Rights Act.

16/ Criminal Records Bureau

If, during the course of your employment, you are convicted of, or charged with, a criminal offence (with the exception of a traffic offence), whether it arises from your employment or otherwise, you are required to report the matter to People & Communications, who will advise on any appropriate action. Failure to report a conviction may itself lead to action being taken against you under the Group's Disciplinary Procedure. Any information will be treated confidentially except insofar as it is necessary to inform other relevant members of management.

17/ Monitoring of Personal Communications

You should be aware that the Group may monitor, intercept or record all communications received or made via the Group's telephone and computer systems including e-mail and internet usage. You should not use the Group's telephone or e-mail system for personal use without permission. If you wish to make a call that you do not want to be monitored you should discuss this with management. Monitoring may be conducted by any member of management but will be for work-related purposes only.

18/ Right to Search

The Group reserves the right to carry out a search of you and/or your property (including vehicles) whilst you are on our premises or our tenant's premises. These searches may be random and do not imply suspicion. If practicable you may be accompanied by a third party. You may be asked to remove the contents of your pockets, bags, vehicles, etc. Whilst you have the right to refuse to be searched, such refusal may constitute a breach of contract, which could result in your dismissal.

19/ Retirement

The Group does not have a normal retirement age.

20/ Property to be Returned on Termination

Upon termination of your employment for whatever reason you shall promptly return to the Group all property which may have been prepared by you or has come into your possession in the course of your employment with the Group and you shall not retain any copies thereof. Title and copyright therein shall vest in the Group. Such property shall include without limitation any confidential information, correspondence, documents, equipment, computer discs, uniform, keys, identification documents and badges and mobile phones. A failure to return property may result in deductions from your final salary.

After the termination of your employment you will not at any time make any untrue or misleading statements about the Group or its employees or represent yourself as being, after such a

termination, employed by, or connected with the Group.

21/ Third Party Rights

The Contracts (Rights of Third Parties) Act 1999 will not apply to this Contract. No person other than you and us will have any rights under this Contract and will not be enforceable by any person other than you and us.

SA/15 - People Management
Highly motivated and innovative team culture

Key Service Area Performance Measures - Outcome | Efficiency | Satisfaction |

Ref	Performance Measure	PTD	TTD	PFY	FFY	2019/20											
						Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
M1	Group Voluntary Turnover Rates (Excluding retirement) %	7.74%	9.33%	1.74%	8.37%	0.89%	0.00%	0.88%	0.86%	0.00%	1.68%	0.85%	0.84%	0.00%	1.64%	1.66%	2.49%
M2	Group Turnover Rates %	3.49%	16.12%	3.49%	12.55%	1.79%	0.89%	0.88%	0.86%	0.00%	4.20%	0.85%	0.84%	0.00%	1.64%	1.66%	2.49%
M3	Total number of Grievances	-	0	-	-	0	0	0	0	0	0	0	0	0	0	0	0
M4	Total number of Disciplinary/Capability	-	0	-	-	0	0	0	0	0	0	0	0	0	0	0	0
M5	Total number of Performance Improve Plans in place	-	6	-	-	0	0	1	0	0	1	0	3	0	3	3	3

What is this quarter's Service Delivery Report telling us?

The overall People Management performance is worse than expected

[M1, M2, M5] Turnover rates are higher than this time last year, with nineteen people leaving since April, two of these were due to the apprentice fixed term contracts ending; two retired; seven moved for career opportunities, one went to university; one left due to the end of a government scheme; six for personal/other/N/K reasons. Rates are above the CHC 2019 average of 13.22% and 8.6% (voluntary). We will continue to monitor this during 20/21. The number of people on Performance Improvement Plans has increased from 2019 which can be seen as a positive as managers are being proactive in dealing with poor performance concerns. The TTD figure is not a cumulative figure as a PIP may run over several months for one individual.

What actions/improvements are we going to take?

- Exit interviews have been reviewed and a survey monkey questionnaire will be sent directly to leavers for feedback. Trends will continue to be monitored

Performance 1 | Support - 1 | Support - 1920Yr | Support 2 - FTE | Leavers | Budget | Data Sets | Improvement | H&S | Support - 1819 Yr | (+)

MBH																	
April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover
0.00%	0.00%	0.00%	15.85%	0.00%	0.00%	0.00%	0.00%	0.00%	15.60%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
0	0	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0
6.24	Start FTE	7.24	Start FTE	6.64	Start FTE	6.23	Start FTE	6.23	Start FTE	6.54	Start FTE	6.54	Start FTE	6.41	Start FTE	6.41	Start FTE
WVCA																	
April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover
0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13.33	Start FTE	13.33	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE
OVERALL TURNOVER (to include voluntary and retirements)																	
April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Turnover	Turnover	Turnover	Turnover	Turnover	Turnover	Turnover
1.73%	0.83%	0.83%	0.66%	0.00%	4.20%	0.85%	0.84%	0.00%	1.64%	1.66%	1.73%	0.83%	0.83%	0.66%	0.00%	4.20%	0.85%
2	1	1	1	0	5	1	1	0	2	2	2	1	1	1	0	5	1
111.8	Start FTE	112.85	Start FTE	113.83	Start FTE	119.01	Start FTE	119.14	Start FTE	120.61	Start FTE	120.61	Start FTE	122.25	Start FTE	122.25	Start FTE
areb																	
April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Turnover	Turnover	Turnover	Turnover	Turnover	Turnover	Turnover
1.08%	1.22%	1.07%	0.00%	0.00%	5.10%	1.02%	1.01%	0.00%	0.93%	1.01%	1.08%	1.22%	1.07%	0.00%	5.10%	1.02%	1.01%
1	1	1	0	0	5	1	1	0	1	1	1	1	1	0	5	1	1
92.23	Start FTE	82.28	Start FTE	93.61	Start FTE	98.44	Start FTE	98.07	Start FTE	97.73	Start FTE	98.73	Start FTE	99.73	Start FTE	99.5	Start FTE
MBH																	
April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover
0.00%	0.00%	0.00%	19.01%	0.00%	0.00%	0.00%	0.00%	0.00%	15.60%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
0	0	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0
6.24	Start FTE	7.24	Start FTE	5.26	Start FTE	6.23	Start FTE	6.23	Start FTE	6.54	Start FTE	6.54	Start FTE	6.41	Start FTE	6.41	Start FTE
WVCA																	
April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover	Voluntary Turnover
7.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13.33	Start FTE	13.33	Start FTE	13.38	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE	14.34	Start FTE

Performance 1 | Support - 1 | Support - 1920Yr | Support 2 - FTE | Leavers | Budget | Data Sets | Improvement | H&S | Support - 1819 Yr | (+)



Kate Houston
3 Gelliswick Road 123
Hakin
Milford Haven
Pembrokeshire
SA73 3RB



Ref:pa
20/4/18

Dear Kate,

2018/19 Pay Level

Further to our recent correspondence regarding the Board's recommendations on the 3 year market testing exercise and the annual pay review assessment, we are now in a position to confirm the Board's decision in relation to the 2018/19 pay level.

The Board having received the above information and considered the Group's ongoing Business Plan have drawn the following conclusions:

1. The 2017/18 Market Testing Report prepared by Forest HR does represent an acceptable basis upon which we can set an appropriate pay level for each role
2. Using the 2017/18 Market Testing Report, it is proposed that pay levels will be set to 'Median' for each role across the group
3. It is then proposed that the pay award for 2018/19 is 2.25% on top of the '2017/18 Median' pay level established in the Forest HR report

The effect of the above means that for the period of 6/4/2018 to the 5/4/2019 your pay will be £20,965.

In addition you will receive the following L&D supplement £1,273 p/a

This salary is for your HR Assistant role.

Having had time to absorb the information in this letter, please talk in the first instance with your manager regarding any individual queries in the process adopted who will respond with the assistance of the HR Manager where appropriate.

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

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





The process of review identified a number of areas for further consideration during the year including, the high number of job descriptions for similar roles, the effectiveness of the PIPS scheme and the need to review pay alongside other benefits as a total rewards package.

I understand there have been some discussions surrounding the approach taken by the Board in respect of remuneration. We can assure all that the market testing and pay award processes were applied consistently to all roles within the group and in accordance with the Board's obligations to assess pay levels in terms of market assessment and uplifts for inflation from one year to the next, having regard to Business Plan affordability. The market testing report from Forest HR (minus specific pay level detail) and a copy of the CHC pay award survey of Welsh Housing Association's anticipated pay awards from 2017/18 to 2018/19 will be available on the HR Yammer page week commencing 23rd April 2018. This signals a desire to be as transparent as possible on the remuneration process; we will continue to develop this approach over subsequent reviews.

Thank you for your input over the last year that has seen a lot of change including the start of ateb and consequently a new chapter in our evolution, we hope that 2018/19 will prove to be equally as successful as last year.

Regards

Nick Hampshire

Group Chief Executive

T: 01437 774700

E: nick.hampshire@atebgroup.co.uk

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

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

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Mae grŵp 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. ateb group limited is a registered society with the FCA, Reg. No 23308R, a registered social landlord with the Welsh Government, Reg. No PO72 and is a member of Community Housing Cymru.

From: Kate Houston
To: Antony James
Subject: Team leaders
Date: 26 May 2020 10:05:09

Hi Kate,

Further to our earlier conversation I can confirm that following the review and business proposal to transform customer services the decision included not to replace Chris Hall's post and create a new tier of team leaders and additional floating maintenance worker post.

This was a great way to engage my team who have felt for many years there was no progression in maintenance. The posts have worked out well and has given a new enthusiasm between the boys.

Antony James
Maintenance and Compliance Manager



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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.

Training Analysis identifying skill gaps

[illegible]

Email's were sent to each employee detailing the skill gaps asking them to complete these by June 2020 please see example below:-

E-learning

 Kate Houston
To Dylan MacLeod
Cc Amy Williams

 You forwarded this message on 19/05/2020 13:48.

 Access Instructions.pdf 114 KB

 How to access DV e-learning.pdf 290 KB

Hello,

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

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

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

There are a few different platforms to access the modules; I have attached access instructions to this email. If you have any queries please let me or Jo know. Please note, we are currently sourcing an accredited course for Asbestos Awareness therefore, you will not be able to access this yet, please wait for further info.

[illegible]

Showing 1 of 1 reply · Last reply April 7 at 11:01 AM

David Pannell: Well done **team**. Hope your dad's ok Paul.

[VIEW FULL CONVERSATION](#)



Nick Hampshire – March 19 at 10:50 PM from iPhone

To All Company

The news of the work coming from the **Welfare Team** was fantastic! Some ambitious ideas that will need plenty of help from us in whatever ways we can.

The **Welfare Team** will show how ateb can work with others to make real differences to people in need of support and it will further demonstrate how much we care for the customers we serve every day of the year.

Next week will bring new challenges I am sure but thanks very much for what you have achieved this week.

Nick

Started March 19 at 10:50 PM

[VIEW FULL CONVERSATION](#)



Tom Waters – March 19 at 4:16 PM

To All Company

Hi everyone,

RE: ateb's Welfare Team

In response to the current Covid 19 situation Nick has asked myself, Ali and Ania to form a new Welfare Team with the aim to support our customers through what may be a difficult time ahead.

We also have Karen Holroyd, Jane Nutland, Amy Williams, Emma Buckland, Philippa Tuck and Karen Brown on the newly formed group

304 total results for **welfare team**

CONVERSATIONS 172 USERS 5 GROUPS 2 FILES 125

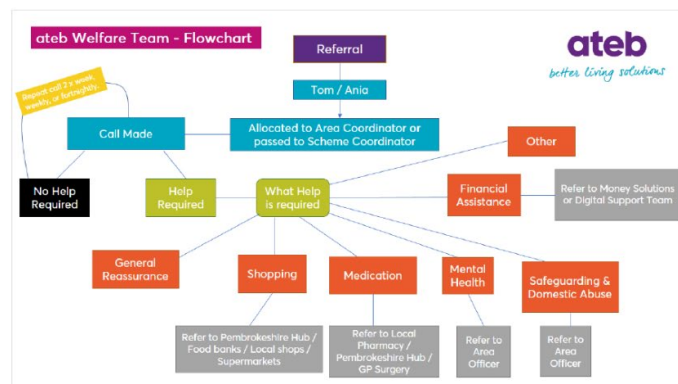


Tom Waters – April 17 at 4:18 PM

To All Company and David Tovey

Please take a look at our **Welfare Team** flowchart of actions (thanks for doing this David Tovey) which demonstrates what happens once we receive a referral for a regular **Welfare** Check Call.

cc: David Tovey



Started April 17 at 4:18 PM

[VIEW FULL CONVERSATION](#)

ADVANCED SEARCH

Search for:

welfare team

In:

Between:

yyyy-mm-dd - yy

[Search](#)

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

Hi Jo, Kate.

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

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

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

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

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

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

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

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

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

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

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

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

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

Many thanks

Tom.

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

Hi Jo,

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

cc Kate for info.

Regards

Matt

Get [Outlook for iOS](#)

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

Hi Matt

Hope you're well and staying safe.

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

Many thanks

Jo
People Advisor

From: Poppy Kucyj
To: Kate Houston
Subject: College
Date: 15 May 2020 14:52:13

Hi Kate

Further to our conversation I can confirm that I have worked with BrightCollie on Ateb's branding over the last 2 years which involved a website analysis and redesign.

It has been so important to achieve brand awareness to reach out to the public, tenants and potential applicants.

Hope this helps!

Poppy Kucyj
Communications Assistant



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SA/12 - Recruitment

Attract and retain the right talent

This is an example of a working service hub. The highlighted text "Attract and retain the right talent" is the overall objective for the service hub which aligns with the corporate aims. Every service hub has its individual objective. These objectives are linked to role profile duties therefore, individuals and teams alike are contributing to organisational objectives.

Reference No	Role Approved date	Advertised Date	Closing Date	Interview Date	Derived Month	Start Date	Vacancy Name	Vacancy Type
HS/26/03/18		26/03/2018	09/04/2018	16/04/2018	Apr-18	09/05/2018	Interim Group Housing Director	Maternity cover
SH27/03/18		27/03/2018	13/04/2018	24/04/2018	Apr-18	29/05/2018	Scheme & Community Co-ordinator	Permanent
M/23/05/18		23/05/2018	08/06/2018	15/06/2018	Jun-18	01/08/2018	Facilities Assistant	Permanent
MM/04/06/18		04/06/2018	15/06/2018	25/06/2018	Jun-18	01/08/2018	Cleaner	Permanent
CS/15/06/18		15/06/2018	02/07/2018	09/07/2018	Jul-18	N/A	Company Solicitor	Permanent
MBH/28/06/18		28/06/2018	12/07/2018	31/07/2018	Jul-18	05/09/2018	Site Inspector & Construction Advisor	Temporary
Hays/07/18		18/07/2018	17/08/2018	20/08/2018	Aug-18	05/11/2018	In-House Solicitor	Permanent
Int/08/18		30/08/2018	10/09/2018	20/10/2018	Oct-18	21/10/2018	Area Officer Internally advertised	Permanent
SH/16/10/2018	19/09/2018	16/10/2018	31/10/2018	09/11/2018	Nov-18	04/01/2019	Money Solutions Officer (FTC 18 months)	Temporary
H/30/10/18	22/10/2018	30/10/2018	13/11/2018	20/11/2018	Nov-18	03/12/2018	Customer Services Advisor	Temporary
INT/11/18		29/11/2018	29/11/2018	02/12/2018	Dec-18	02/01/2019	Sales and Customer Service Coordinator	Temporary
INT/02/19		21/02/2019	08/03/2019	13/03/2019	Mar-19	28/05/2019	Senior Scheme Manager (in house)	Maternity cover
SH/05/03/19		05/03/2019	20/03/2019	28/03/2019	Mar-19	24/04/2019	Digital Support Assistant	Temporary
HS/02/04/19		02/04/2019	24/04/2019	07/05/2019	May-19		Customer Services Advisor	Permanent
F02/04/2019		02/04/2019	23/04/2019	03/05/2019	May-19	01/07/2019	Finance Assistant	Permanent
SH05/04/2019		05/04/2019	29/04/2019	08/05/2019	May-19	03/06/2019	Extra Care Scheme Manager	Maternity cover
WWCR09/04/2019		09/04/2019	07/05/2019	15/05/2019	May-19	15/07/2019	Caseworker	Permanent
PC17/05/19	01/05/2019	17/05/2019	31/05/2019	14/06/2019	Jun-19	29/07/2019	Communications Assistant	Permanent
H28/05/19	16/05/2019	28/05/2019	10/06/2019	20/06/2019	Jun-19		Estates Coordinator	Permanent
Int/20/5/19	20/05/2019	20/05/2019	28/05/2019	06/06/2019	Jun-19		Cleaner	Permanent
SP/20/05/19	20/05/2019	20/05/2019	31/05/2019	13/06/2019	Jun-19	05/08/2019	Scheme & Community Co-ordinator	Permanent
	18/06/2019	24/06/2019	05/07/2019	18/07/2019	Jul-19		Customer Services Manager	Temporary
	12/06/2019	03/07/2019	15/07/2019	07/08/2019	Aug-19		Maintenance Apprentices	Temporary
					Jan-00			
					Jan-00			
					Jan-00			
					Jan-00			

1. Why are you leaving the ateb group?

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

Other (please specify)

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

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

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

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

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

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

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

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

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

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

From: Bethan Elliott
To: Kate Houston
Subject: Statement
Date: 26 May 2020 17:20:31

Kate has asked me to write a short statement relating to her involvement in recruiting for 2 Finance Assistants within my team.

My team was under pressure as it was approaching the year end therefore Kate was asked to advertise these positions as a matter of urgency. My Manager and I instructed Kate to advertise the positions and we presumed these would be permanent positions. When we found out this was not the case, we asked Kate for longer-term contracts of 24 months, but this was declined. Kate was in a difficult position and acted as a go between with Nick therefore we had all had a rocky start!

Kate impressed me throughout the process, she ensured I was given one-to-one time to go through how to shortlist, how to interview and over the protected characteristics. I found this useful as I had not been involved in recruitment up until now. Kate regularly challenged me and my colleague over decisions which ensured I did not let my personal preferences cloud our decision making.

Due to my limited experience my colleague took the lead in this recruitment as recruitment chair and I shadowed the process.

Kate produced all documents however my colleague and I were involved in designing a test and preparing interview questions. Kate assisted us along the way and her guidance and support at every stage was appreciated. She ensured the recruitment ran on time and she continually prompted us when it was needed.

I was really impressed by Kate's professionalism therefore I gave her a SPOT in her Achieve letting her Manager know that the process was undertaken efficiently.

Bethan Elliott
Finance Officer (Payments & Collections)

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Introduction

This process is often referred to as ‘longlisting’ and ‘shortlisting’ and is an essential part of selecting the best candidate for your role.

Both imply a process through which applications are assessed against a set of essential and desirable criteria, with a group of candidates who meet these being put forward to the next stage of the selection process.

With care and effort at this stage you will find the high-quality applicants you want for final selection. Scoring and assessment at the shortlisting stage should continue to hold importance right up to the final selection of the successful candidate.

1 Longlist vs. Shortlist

In a large group of candidates, a **longlist** can be used to score each candidate against each of the selection criteria to identify which candidates meet the criteria and to what extent. This process can be used to eliminate candidates from the process who do not meet selection criteria.

Your longlist of candidates would then be lessened into a **shortlist** after a first assessment.

As a recruiting manager, the first decision to make is whether your pool of applicants warrants an initial stage of assessment. If so, this would require making a longlist, which would then be narrowed down to a shortlist after a first assessment.

When coming to this decision you should consider the following:

- If there is a strong pool with a number of potentially suitable applicants, without a few standout applicants, then you may want to include a first assessment stage.
- If you decide to create a longlist and include a first assessment stage, be clear to candidates that you are inviting them for this purpose.

“Regardless of whether you conduct an initial longlist, or move straight to

a shortlist, you will assess candidate applications in the same way.”

2 Shortlisting

Regardless of whether you conduct an initial longlist, or move straight to a shortlist, you will assess candidate applications in the same way.

This stage in the recruitment and selection process is essential and the rest of the process relies on an application assessment that puts forward the best candidates.

2.1 Points to consider

Do consider the following when conducting your assessment:

- Agree with your panel, the competencies being measured. These should be taken from the Person Specification and based on essential criteria (and maybe some desirable criteria) at this stage.
- Be consistent in your approach and do not introduce new criteria that do not feature in the Person Specification.
- Look for evidence that the applicant meets the criteria. Consider the examples that candidates provide to demonstrate that they meet the criteria and evaluate whether they meet your requirements.
- Only shortlist those who meet all the essential criteria. If there are a large number that are suitable, use the desirable criteria to help narrow down the number to a final shortlist.
- Where possible, ensure that all panel members input in to the final candidate list and that there is majority agreement on the decision.
- Ensure that candidate scores, and any comments relating to the shortlisting process, are captured on the School’s e-recruitment system. This is important in general, but necessary for UK Visa and Immigration (UKVI) requirements if you are considering non-EEA applicants.

1. Introduction

This section of the recruitment toolkit has been created to support recruiting managers with interviewing.

It provides you with an overview of what good practice interviewing looks like and what legal obligations you should be aware of, particularly with regards to avoiding discrimination.

1.1 Good practice when conducting interviews

The purpose of conducting interviews is to collect information on each candidate's job-related knowledge, skills and experience in order to decide which candidate is the most suitable person for a particular role.

Interview questions should therefore be structured to enable the candidate to share and evidence their experience, and interviewers should be mindful not to make decisions based on assumptions about candidates that are linked to the interviewer's own views and opinions.

As a recruiting manager, you should establish a set of **core questions** to ask all candidates. These will typically be competency (also known as behavioural) based questions, which provide candidates with the opportunity to provide example based responses in order to evidence how they meet the person specification. A set of core questions will ensure consistency and fairness, as all candidates will be given an equal opportunity to share their skills and abilities.

Whilst a core set of questions is important, you should not restrict the interview process to these questions only. At times there will be a need to ask candidates to expand on their answers and clarify points, for example where a candidate has provided a vague response, or you need them to explain a gap in their employment history.

Using job-related exercises as part of the selection process can also be helpful to assess elements of

the person specification that are difficult to test at interview or evaluate through references.

HELP:

Looking for information on **panel composition**?

Please refer to the '*Planning Your Recruitment*' section of the Recruitment Toolkit

1.2 The Law

Employers are liable for any discriminatory actions carried out by their staff in the course of their employment.

This means that if a recruiting manager who is conducting interviews does or says anything that could be construed as discriminatory, the School will potentially be liable to pay compensation to the victim if a successful claim is later made at an employment tribunal.

All candidates are protected against discrimination because of:

- Sex
- Transgender status (i.e. where a job applicant has had a sex change or is in the process of changing sex)
- Pregnancy and maternity
- Race

1 Unconscious bias

Unconscious bias can influence decisions throughout the employee lifecycle, including recruitment, promotion and performance management.

1.1 What is unconscious bias?

Unconscious bias occurs when individuals favour others who look like them and/or share their values. For example a person may be drawn to someone with a similar educational background, from the same area, or who is the same ethnicity as them.

EXAMPLES:

A manager who was not successful at school may listen to, or be supportive of, an employee who left school without qualifications because, subconsciously, they are reminded of their younger self. The same can be true of a manager who is educated to degree level, favouring employees who have also been to university. This is known as affinity bias, because they feel an affinity with the person as they have similar life experiences.

Another form of unconscious bias is known as the halo effect. This is where a positive trait is transferred onto a person without anything really being known about that person.

For example, those who dress conservatively are often seen as more capable in an office environment, based purely on their attire.

Everyone has unconscious biases. The brain receives information all the time from our own experiences and what we read, hear or see in the media and from others. The brain uses shortcuts to speed up decision making and unconscious bias is a by-product. There are times when this sort of quick decision making is useful, for example if faced with a dangerous situation, however it is not a good way to make decisions when dealing with recruiting or promoting staff.

1.2 Key points

- It's natural.
- It's unintended.
- It can affect decisions.
- It can be mitigated.

Where unconscious bias is against a protected characteristic, it can be discriminatory. For example if during a recruitment process a recruiting manager ignores the skills and experience of a candidate who is a different race than them and appoints another candidate who is the same race, this could be discriminatory.

Conscious thoughts are controlled and well-reasoned. Unconscious thoughts can be based on stereotypes and prejudices that we may not even realise we have. Stereotypes surrounding tattoos may subconsciously suggest a person is unlikely to conform and follow rules. Stereotypes surrounding mothers may lead to unconscious bias against women who apply for a role which involves regular travel away from home.

“Everyone has unconscious biases.”



Dear Applicant,

Finance Assistant: Fixed term 12 months contract x 2

Thank you for your interest in the role of Finance Assistant at ateb group limited.

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

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

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

Hopefully the information pack provides you with sufficient background to be enable you to submit your application, which we look forward to receiving **no later than 9 a.m. on Monday, 10th February 2020** but if you have any queries, please don't hesitate to contact us at recruitment@atebgroup.co.uk

Nick Hampshire
Chief Executive

Attached - Role Profile | Recruitment Pack | Advert

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

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ateb needs you to



create better living solutions

ateb
better living solutions

Do you want to join our busy Finance Team?

Finance Assistant

c£21k

Fixed term: 12 months contract x 2

37 hours per week

We have a great opportunity for a Finance Assistant to join ateb within an established team. You will be based at our office in Haverfordwest and work within our friendly Finance Team. You will assist in the operation of our Purchase Ledger, Procurement Card System & Tenant Rent Accounts.

You will have high level of numeracy, be confident in the use of IT Systems and have a good knowledge of Excel.

This role needs someone who is a great team player, enthusiastic and willing to learn new skills.

This is a great chance to join the ateb team and help to create better living solutions. Check out the role details for more information.

Closing date: 9am, Monday, 10th February 2020

Interview date: Tuesday, 18th February 2020

#WeAreAteb

Role/ Finance Assistant

EV. 33

About us...

ateb *better living solutions*



Our purpose:

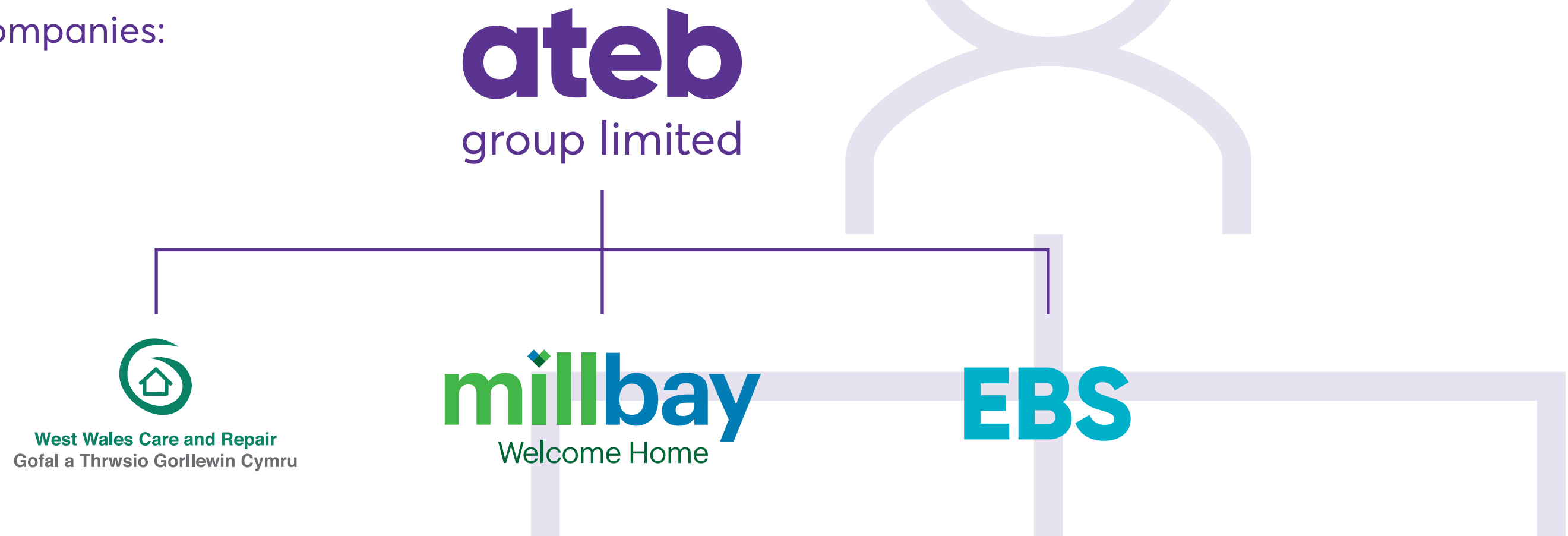
The ateb group (where ateb means answer or solution in Welsh) is a unique set of companies that collectively has the shared purpose of...

Creating
better living
solutions...

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



The ateb group consists of the following companies:



The group offers various services across the West Wales counties of Carmarthenshire, Ceredigion and Pembrokeshire. The parent of the group, ateb group limited, is regulated by the Welsh Government who in turn regulates the subsidiary organisations through a Welsh Government Circular 05/08 – Group Structures. Each Company has its own Board that report to the parent Board.



What's in our DNA?

#InYouWeTrust

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

#AccessAllAreas

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

#GetThingsDone

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

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



Our Value For Money Commitment...

Above all, we will continually
strive to deliver...

the right **outcomes, efficiently**
with **great customer experience...**

for the people and
communities of West Wales.



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

> **Promotes our Purpose**

> **Supports our DNA**

> **Sets clear outcomes for our efforts**

> **Defines operating boundaries and risk**

> **Promotes learning over failure**

> **Supports colleagues to experiment to achieve more**

> **Appreciates colleague's achievements, efforts and commitment**

We believe that good leaders will always:

1/ Pay **attention** to people

2/ **Understand** people needs

3/ Show **empathy** in their response

4/ Help to **resolve** issues



The group has defined each strategic aim as follows:

Aim 1: Improve Corporate Strength

Purpose	We must ensure we have the right ambitious purpose
Governance	We must have the right skills, competencies and systems to govern effectively
Culture	We must have the right DNA and working arrangements running throughout the Association
Resources	We must have the right finances, people, partnerships and infrastructure

Aim 2: Improve Service Delivery

Customers	We must always deliver the right outcomes, efficiently with great customer experience
Property	We should always maximise our property assets and property investment
People	We must attract and retain the right skills, experience and enthusiasm
Systems	We need to have the right process and infrastructure to be high performing

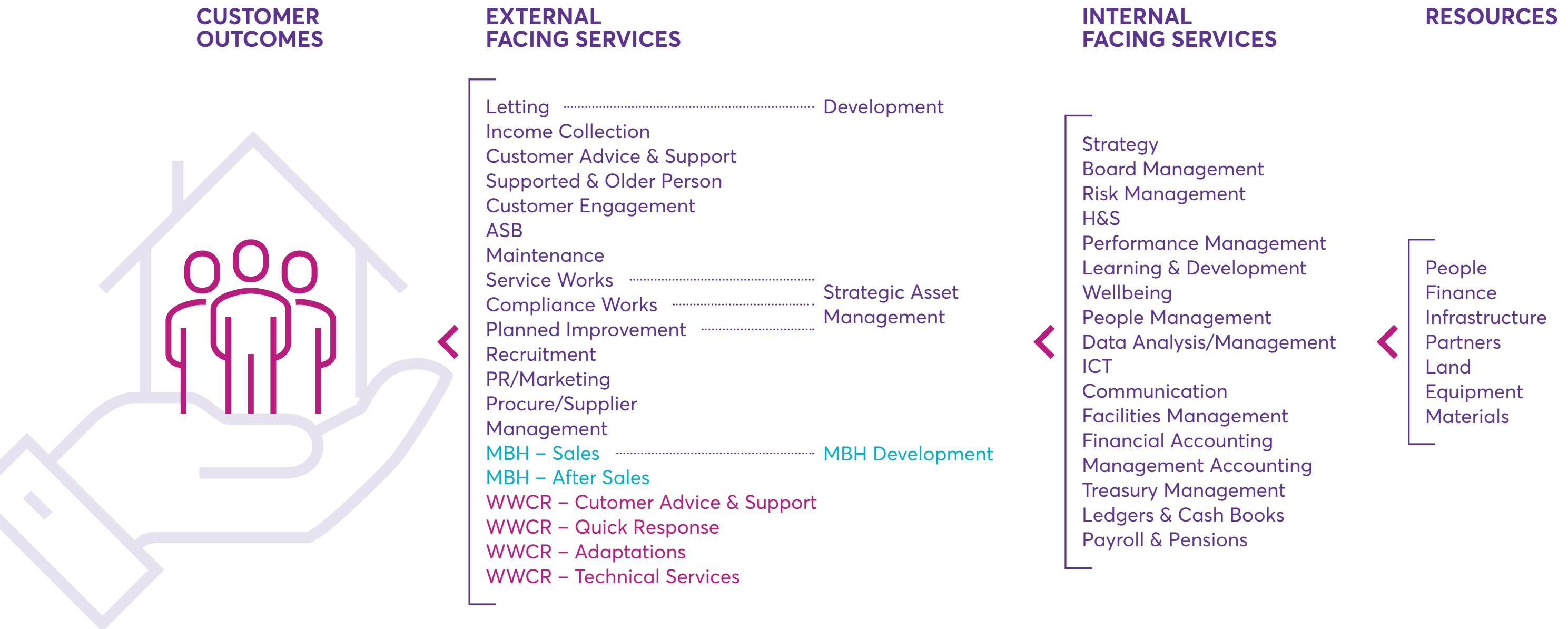
Aim 3: New Business Growth

Service Growth	We should identify how we can grow our existing services
Market Growth	We should explore whether we can add value to our purpose by branching into complimentary market sectors
Diversification	We should evaluate whether there is merit in diversification that adds value to our purpose
Collaboration, Merger & Acquisition	We should explore all opportunities that add value to our purpose through working with others



7/ Service Delivery Plan

ateb group has established a service delivery plan that has the following services:





Is This For You?



THE ROLE

You will be based at our office in Haverfordwest and work within our friendly Finance Team. You will assist in the operation of our Purchase Ledger, Procurement Card System & Tenant Rent Accounts.

You will have a high level of numeracy, be confident in the use of IT Systems and have a good knowledge of Excel.

This role needs someone who is a great team player, enthusiastic and willing to learn new skills.

This is a great chance to join the ateb team and help to create better living solutions. Check out the role profile details for more information.

THE TEAM

The Finance Team of eleven support the business by providing high quality financial support and information to both internal and external customers for all three companies within the ateb Group.

KEY DATES

Closing Date	9a.m.10th Feb 2020
Interview	18th Feb 2020






Dashboard
Vacancies
Message Centre
Stats
Forms
Users

Live

Expired

↳ Finance Assistant (Fixed term contract: 12 months x 2) [FA/28/01/2020]

Expired - Finance Assistant (Fixed term contract: 12 months x 2) [FA/28/01/2020]

Title

Finance Assistant (Fixed term contract: 12 months)

Reference

FA/28/01/2020

Owners

Adrian Williams
Amy Williams
Antony James
Bethan Elliott
Ceri Barnett

Location

Meyler House, St Thomas Green, Haverfordwest

Salary

C. £21k

Hours

37 Hours (Monday to Friday)

Job Advert

Source

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

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

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

Closing date: 9 a.m. Monday 10th February 2020

Vacancies



Join ateb

There are many ways you can make a difference at ateb. Take a look through our current vacancies.

If you require any assistance with any vacancies advertised, please contact People & Communications on [01437 776950](tel:01437776950)

3 steps to join ateb:

Step 1:

Check out who we are and what we do on our website to see if we're a match!
Find out what roles we have available on our vacancy page. If you like what you see, click into the role to find out more to get a feel for the role.

Step 2:

Once you've read the documents and you think it's the role for you, hit the apply button. Keep the information to hand as you'll need this to write a cracking application.
At ateb we want to hear all about your skills and experience and how

LinkedIn sharing Finance Assistant posts

The screenshot shows the LinkedIn interface for the 'ateb Group' page. The top navigation bar includes the LinkedIn logo, a search bar, and icons for Home, My Network, Jobs, Messaging, Notifications (57), and Me. Below the navigation bar, the 'ateb Group' page header is visible, with tabs for Home, Career Pages, Content, Analytics, and Activity (14). The main content area displays a post by Kate Houston, dated 1/28/2020, with a 'Sponsor now' button. The post is for a 'Finance Assistant' position, described as a 'Fixed term contract 12 months x 2' and '37 hours per week'. The post includes a large image with the text 'ateb needs you to create better living solutions' and the ateb logo. The image shows a coastal landscape with a hand icon pointing towards the text. Below the image, there are 3 likes and a comment section with 'Like' and 'Comment' buttons. The post also has a 'Notify Employees' button in the top right corner.

Get more impressions by notifying coworkers. [Notify Employees](#)

Posted by Kate Houston • 1/28/2020 • [Sponsor now](#)

ateb ateb Group
420 followers
4mo •

****New Vacancy****
Finance Assistant (Fixed term contract 12 months x 2)
37 hours per week [...see more](#)

ateb needs you to

create better living solutions
ateb
better living solutions

3

Like Comment

Be the first to comment on this

Yammer sharing Finance Assistant posts

(22) Yammer : Search: finance assistant posts

Edit View History Help



ATEB GROUP GROUPS +

People & Communications

E2i

ICT

Sheltered And Extra Care Schemes

Adaptable Workplace - Our Future...

Workspace & Environment - Our F...

ateb VISION and supporting docu...

ateb Induction

i2i

Wellbeing

Dot.e

All Company 2

Search Results

122 total results for **finance assistant posts**

CONVERSATIONS 53 USERS 19 GROUPS 1 FILES 49



Kate Houston – January 28 at 3:22 PM (Announcement)

To People & Communications

 **New vacancies - Finance Assistant posts**

Finance are looking for 2 x **Finance Assistant posts** both fixed term for 12 months.

Closing date: 9am, Monday, 10th February 2020

Interview date: Tuesday, 18th February 2020

Find further details please log into our website

Started January 28 at 3:22 PM

 [VIEW FULL CONVERSATION](#)

Facebook sharing Finance Assistant posts

 ateb Group

Send Message

Like

Page created – 28 November 2017

The Pembrokeshire H...
Ian Hawkins likes this
Newspaper

Like

Cartrefi Dewisedig Sir...
Jade Manning likes this
Government organisation

Like

Fresh Fruit and Veg D...
Steven Allen likes this
Product/Service

Like

Add your business to Facebook

Showcase your work, create ads and connect with customers or supporters.

Create Page

Information about Page Insights data · Privacy · Terms · Advertising · Ad choices · Cookies · More · Facebook © 2020

 ateb Group

28 January · 🌐

...

New Vacancy

Finance Assistant (Fixed term contract 12 months x 2)
37 hours per week
c£21k per annum... See more

ATEBGROUP.CO.UK

Vacancies - ateb

Want to be part of the team at ateb Group? Help create better living solutions for the people and communities of West Wales. See our current...

5

14 shares

Like

Comment

Share

 Write a comment...

"Most relevant" is selected, so some comments may have been filtered out.

 ateb Group

28 January · 🌐

...

Have your say on ateb's Disability Group!

Shortlisting Matrix Finance Assistant x 2 Fixed term 12 months contracts - Closing date 10th February 2020

- 0- No demonstration of skill/ experience/ qualification
 1- Mentions the skill/ experience/ qualification
 2- Mentions and brief example of skill/ experience/ qualification
 3- In depth example and detail of skill/ experience/ qualification and relates their example back to the Job Description.

No:	Name:	1. Technical competency	1a. Academic competency	1b. Practical competency	2. Decision making	3. People Management	4. Team working	5. Financial control	6. Organisational skills	7. Innovation	8. Customer service	9. Project/process management	10. Enthusiasm	11. Technology competency	12. Communication	Total
1		2	2	2	2	2	2	2	2	1	2	2	2	2	2	27
2		3	2	3	3	2	3	3	3	3	3	3	2	2	2	37
3		2	2	2	1	1	2	2	1	3	2	3	3	2	2	28
4		1	1	1	0	0	0	0	0	0	0	0	0	0	0	3
5		1	0	1	0	0	0	0	0	0	0	0	0	0	0	2
6		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7		2	2	1	0	0	0	0	0	0	0	0	0	0	0	5
8		0	0	0	0	0	0	1	0	0	0	0	0	1	0	2
9		2	2	0	0	0	0	0	0	0	0	0	0	0	0	4
10		2	2	1	0	0	0	1	0	0	0	0	0	0	0	5
11		2	2	2	2	1	1	2	2	1	1	0	1	2	1	20
12		2	2	2	1	1	1	2	1	0	1	0	1	2	1	17
13		0	0	0	0	1	1	1	0	0	1	0	1	1	1	7
14		1	0	1	0	0	0	1	0	0	0	0	0	2	1	6

1. What do you know about ateb?

[illegible][illegible][illegible][illegible]

Interview Matrix
Finance Assistant - 18th February 2020

Question	Name:	■	■	■	■	■	■
1	ateb knowledge						
2	Attraction to post						
3	Current role/ responsibilities						
4	Experience - Spreadsheets/ finance system						
5	Scenario - Customer service/ problem solving						
6	Change culture						
7	Team work						
8	DNA - flexibility						
9	Working to own initiative						
10	Personal attributes						
11	DNA - communication						
Total							

Scoring – candidates answers should be scored as follows:

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

Interview Matrix
Finance Assistant - 18th February 2020

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

	A	B	C	D	E	F	G	H	I	J	
9	41500	FS		FUEL - CP16 AHZ	7978	P	Didcote	Square & Compass Filling	64.0		
10	41500	FS		FUEL - CP16 AHZ	7978	P	Didcote	Letterstone Filling St	65.0		
11	41500	HI		DAYS RENTAL - CP16 FZT	4723	A J S	Williams	Days Fleet	322.1		
12	41500	HPE		FUEL - CU18 HZK	2731	G	Harries	W M Morrison	77.0		
13	41500	HPE		FUEL - CU17 PKV	6045	M D S	James	Tesco Pfs 3960	91.5		
14	41500	HPE		FUEL - CP16 FZU	6312	D	Pannell	Tesco Pfs 3856	108.0		
15	41500	HPE		DAYS RENTAL - CP16 AEZ	4723	A J S	Williams	Days Fleet	322.1		
16	41500	HPE		DAYS RENTAL - CP16 FZS	4723	A J S	Williams	Days Fleet	338.6		
17	41500	HPE		DAYS RENTAL - CP16 FZU	4723	A J S	Williams	Days Fleet	322.1		
18	41500	HPE		DAYS RENTAL - CU17 OMZ	4723	A J S	Williams	Days Fleet	335.3		
19	41500	HPE		DAYS RENTAL - CU17 PKV	4723	A J S	Williams	Days Fleet	340.6		
20	41500	HPE		DAYS RENTAL - CU18 HZK	4723	A J S	Williams	Days Fleet	357.7		
21	41500	HPE		FUEL - CU18 HZK	2731	G	Harries	W M Morrison	93.0		
22	41500	HPE		FUEL CP16FZS	3863	M	Whittaker	Tesco Pay At Pump 3856	86.9		
23	41500	HPE		CP16 AEZ - FUEL	3208	P D	Green	Halfords 0486	8.9		
24	41500	HPE		FUEL CU17 OMZ	0200	S A	Price	Tesco Pfs 3856	98.0		
25	41500	HPE		FUEL - CP16AEZ	3208	P D	Green	Tesco Pfs 3960	99.9		
26	41500	HPE		FUEL - CP16 FZT	4164	T	Clode	Tesco Pfs 3960	100.0		
27	41500	HPE		FUEL - CP16 FZU	6312	D	Pannell	Tesco Pfs 3960	97.0		
28	41500	HPE		FUEL - CP16 FZS	3863	M	Whittaker	Tesco Pay At Pump 3856	95.7		
29	41500	HPE		FUEL - CU17 PKV	6045	M D S	James	Tesco Pfs 3960	80.2		
30	41500	KF		DAYS RENTAL - CU17 PKZ	4723	A J S	Williams	Days Fleet	322.6		
31	41500	KF		FUEL - CU17 PKZ	9579	L	Rigby	Tesco Pfs 3856	114.3		
32	41500	LE		FUEL - CP16 AHF	8761	D	Pannell	Tesco Pfs 3960	70.0		
33	41500	LE		DAYS RENTAL - CP16 AHF	4723	A J S	Williams	Days Fleet	232.2		
34											
35											
36											
37											
38	1) Put total of cells I&J in column K										
39	2) Total columns I, J and K										
40	3) Format to 2 decimal places and comma separated										
41	4) Put a filter on columns A - K										
42	5) What is the total spend on fuel for the month?										
43	6) How much has been spent on gas servicing in the month (nominal code 41115)										
44	7) Rename tab from "Sheet1" to Jan										
45	8) Format sheet so headings/totals stand out										
46	9) Which nominal code has the largest spend										
47	10) How much has been spent on void works at 18 Cuckoo Wood?										
48	11) What was the smallest and largest transaction spend in January										
49											

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

Candidate Name:

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

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

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

How interested are they in the role?

0 = no evidence of interest 4 = enthusiastic and interested

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

How engaged with you were they?

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

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

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

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

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

Additional Comments:

Don't forget...

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

What does this mean in practice?

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

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



I _____ acknowledge receipt of ateb group's privacy notice and confirm that I have read the Data Protection Procedure (Employees) and understand my responsibilities under it.

Signed:.....

Dated:.....

Add Fields	Properties
Stage Info	
Header	
Paragraph	
Single line text	
Multi line text	
Single choice dropdown	
Multiple choice dropdown	
Radio Buttons	
Sift Question	
File upload	
Date choice	
LinkedIn URL	
Candidate Name	
Candidate Preferred Name	
Candidate Forename	
Candidate Middlename(s)	
Candidate Surname	
Candidate Email	
Candidate mobile phone	
Media Source	
Check boxes	

SummaryPage 1Add Page...

POLICY STATEMENTHeader

ateb Group is fully committed to the principle of equal opportunities in employment and the delivery of its housing services.Paragraph

We are committed to ensuring that all job applicants, employees, consultants, contractors, volunteers, casual workers, agency workers, tenants, former tenants, visitors and suppliers are treated equally and are not discriminated against on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation (Protected Characteristics)Paragraph

The Group will actively oppose unlawful or unfair discrimination in all aspects of its work.Paragraph

This form helps us to adhere to equal opportunities guidance and make progress towards identifying any barriers to diversity among our workplace. In order to monitor the effectiveness of our Equal Opportunities Policy, we request job applicants to provide the information outlined below. This information is confidential and used solely for monitoring purposes.Paragraph

The form will be separated from your application on receipt and will play no part in the recruitment process. In the event of your successful application this information will form part of your personal record and will continue to be used for monitoring purposes throughout your employment at the Association. Such use will be subject to the provision of the General...Paragraph

Finance Assistant (Fixed term contract: 12 months x 2)(FA/28/01/2020)

Applicant name

Applicant email

Applicant unique id 51151

Role Finance Assistant (Fixed term contract: 12 months x 2)

Date submitted 07/02/2020 08:51

Application details

Before You Begin...Please make sure you complete all questions and ensure you provide us with information that will help us assess if you are suitable for the post. Thank you

ateb group is committed to equal opportunities for all. We are happy to accept applications submitted in a different format; (e.g. by telephone, on tape or by email) if required as a result of an applicant's disability. We are also happy to provide this document in another format; (e.g. large print) on request. Please contact the Recruitment Team to discuss your needs further. Email recruitment@atebgroup.co.uk or telephone 01437 776950.

Are you eligible to work in the UK?: Yes

Do you have a full UK driving licence?: Yes

Due to the conditions within schedule 1 of the Housing Act 1996, ateb is unable to employ any relative or close associate of a Board Member. Are you a relative or close associate to an ateb Board Member?:

No

If yes please provide details:

Have you worked for the ateb group (including West Wales Care & Repair and Mill Bay Homes) within the last 12 months?:

Yes

If yes please provide details: Currently on a 6 month contract as a People Assistant

Are you a relative or close associate of a current employee of the ateb Group (including West Wales Care & Repair and Mill Bay Homes)?:

No

If yes please provide details:

Are you a relative or close associate of a former employee who has worked for the ateb Group within the last 12 months (including West Wales Care & Repair and Mill Bay Homes)?:

No

If yes please provide details:

Email Address:

Your password:

Personal Details

Title:

First Name:

Middle Name(s):

Surname:

Address:

Main Telephone Number:

Other Telephone Number:

Work Telephone Number:

Email Address:

National Insurance Number:

Please answer the following questions to demonstrate your skills and experience relevant to the Finance Assistant role. Please note, we are not accepting CVs therefore, please do not upload a CV as this will not be accepted.

Customer Service Experience

At ateb we always aim to provide a great customer experience both internally and externally. In Finance this means the provision of accurate and timely financial information with a great attention to detail. Please provide examples of how you have demonstrated this:

Throughout my career I have worked with various internal and external clients both those within corporate businesses and members of the public. I strongly believe that a successful company is built on a great customer experience and that is also underpinned by sound financial decision making to drive a business forward. Whilst working at Capita within various roles, my key purpose was to build and maintain good customer engagement and that was underpinned by providing them with a great customer experience.

While I carried out the role of Senior Administrator within Carillion, I would process the payroll of timesheets to ensure all candidates were paid accurately and when expected. Due to the nature of the shift work and the various roles and wages that could change daily for individuals, my attention to detail had to be strong so as to avoid payment mistakes and queries at the end of each week. I successfully completed this task weekly and due to the correct payments being received by all

workers we had a satisfied work force that would continue working for us as required. Working as the Regional Administrator I was responsible for all purchases process through bankcards within the offices across the South Region. This would include the payment of invoices, training, PPE (Personal Protective Equipment), rail and hotel bookings. With this responsibility I also had to reconcile the bankcards and process and report on the Weekly Gross Margins to Senior Managers and Branches. All these responsibilities were important to ensure that external candidates and internal employees had all they required to carry out their duties.

#WeAreAteb

How will you bring personal drive and a positive attitude to help find solutions in difficult situations?:

I am a positive person and always looks for solutions when a problem presents itself. A positive attitude makes you more productive and drives you to success more quickly than a negative mindset.

A manager once said "don't come to me with a problem without having explored all possible solutions beforehand. If after thinking through various solutions, you still are unable to solve the problem then come to me for support". This has stuck with me for many years and is something I always work to. By having personal drive and a positive can-do attitude this contributes to a good working environment, boosts productivity and leads to better relationships with those around you. When these attributes cultivating a positive mental attitude, it allows me to think through problems logically, looking and analysing the facts of a situation in order to pick the best possible solution to follow.

Why are you the best?

Can you explain why you are the best candidate for this role? Please use the role profile to support your statement using section 5. We will be using this information to help us shortlist so please ensure you provide sufficient information.:

Thank you for your time. Please see below my personal statement to each of the points raised in section 5.

- **Technical Competency**

I use administrative skills throughout my daily life both professionally and personally. I have used various Microsoft packages from Word to Excel and have experience of using Sage accountancy package whilst working my way through the AAT course. I have used excel for the processing of Weekly Gross Margins and the tracking and monitoring of bank card payments. All administration carried out requires careful attention to detail, for example if data is not recorded correctly an error occurs and problems follow. Therefore, with the importance of this being paramount, I carefully check my work as I complete it so as not to lose time for other tasks.

- **Decision Making**

Throughout my careers I have had to make difficult decisions. As Supply Chain Specialist I worked to ensure that when agreeing terms of business with external parties they would comply with our policies and procedures and work compliantly with us throughout the terms of the contract. At times we would have external support working with internal stakeholders outside of the terms of business they have agreed and therefore important decisions would be discussed with internal parties to determine if we would continue working with them or not. Furthermore, when completing payroll for individuals we had tight deadlines we had to adhere to. Contractors had a deadline of when we would accept timesheets to be submitted until and if they were late, we would not process these. At times workers would be disgruntled by this however after explaining to them again the reasons for this they would accept the response and wait for the following weeks payments.

- **Teamwork**

In business teamwork is paramount. We must all work together to get the best possible outcome. Throughout my employment history I have always been open minded to new ideas, others opinions and even disagreements to my own personal suggestions. I haven't always agreed with others, but I thrive on having constructive conversations to talk through all ideas and suggestions, in order to

move forward with the best possible outcome for the business and those affected by the decisions being made. The correct environment for a team to thrive is one that is open, honest and transparent and where individuals won't be offended by disagreements and will work well together towards the best outcome. I have lead difficult meetings where the service being received by external parties has not met the KPI's we have set and worked with this parties to create performance management plans and improvement steps for both us internally and for them externally to ensure both parties have the best support possible to achieve. I see this teamwork as effectively turning something negative into a positive.

- Financial Control

Working at Skyblue, Carillion I was responsible for all purchases processed through bankcards within the office in the South Region. I would ensure that we were fully stocked with PPE (Personal Protective Equipment) for all workers and had all the relevant training handbooks for them. With this responsibility I also had to reconcile the bankcards and process and report on Weekly Gross Margins to disseminate to the relevant Senior Managers and offices. Furthermore, I would monitor spending across all offices to ensure budget were being used effectively. Whilst working in St Dogmaels upon moving to Wales I would also cash up at the end of the day and record profits being made for the owners through analyses of the card and cash payments made.

- Organisational Control

At Capita we had our own vacancies to recruit. I had over 100 position to manage at one point. With this, time keeping was even more important then usual and with the help of the IMS (Information Management System) we used, my calendar and the detailed tracking system I devised I was able to effectively manage my work load and ensure that all hiring managers and candidates were kept up to date on where they were within the recruitment process. I recorded all deadlines I agreed with different individuals and prioritised the most important tasks to be completed working my way through them all. If at any point a deadline became increasingly challenging to meet, I would always speak to the relevant individual who may be affected in order to manage their expectations. This normally was the result of a particularly challenging position I was recruitment for and because of this hiring managers already understood the challenges and were accepting of the feedback provided and the revised tactics I had for supporting them with their search.

- Innovation

Whilst working at Capita as a Supply Chain Specialist, I determined what recruitment agencies were agreeing terms with us and then struggling to understand our business in order to attract the correct candidate. I therefore put together briefing guides for each external and internal client we had, providing them with further knowledge of the clients they were supporting Capita to recruit for. Furthermore, I also put forward to my Manager the need to have face to face meetings with new suppliers once terms were agreed, in order to present the clients to them and in some cases allow them to meet particular hiring managers in person to hear first hand what they are looking for from a candidate and what exciting projects they could be working on in the future. This improved our relationship with the agencies hugely, made them more engaged and gave them the best possible tools to support our business needs. Delivery improved and more successful placements were made.

- Customer Service

The customer always comes first. At Capita I worked with both internal and external clients all of whom has different expectations, needs and timelines to work to. Even under pressure and to tight deadlines it's always important to remain professional and communicate effectively. One particular client wanted unique contractual terms with 3 key recruitment agencies, which went against the terms Capita would ordinarily use. Given the importance of the clients needs I lead discussions with the client and recruitment agencies to devise new terms of business that suited the needs they had. This took months of discussions and approvals from Senior Stakeholders, but all was approved and put in place to support them. The Client was extremely please as were the agencies and this showed my other team members that putting the client first is more important then being closed minded and continuing to work the way we always have done.

- Project and Process Management

At Capita the key goal was to recruit the right individuals into the right jobs either through internal

sourcing or external sourcing through recruitment agencies. I managed the monitoring of all recruitment agencies and made recommendations to the internal recruitment consultants as to what agencies would be best to engage, based on their performance results and knowledge of their capabilities and services.

I was responsible for ensuring the supply chain was fit for purpose and that all vacancies could be recruited for. This was my individual objective alongside the rest of the supply chain team and if gaps were identified in supply I would research and source alternative support externally, agree terms with them and they would work along side our internal teams. This process was steps to improve the service we provided to clients in order to reduce the length of time sourcing for vacancies, when the client needed someone to start as soon as possible.

- **Enthusiasm**

Trust, honesty and transparency are terms I live by. I work hard to achieve in all that I do and want others to feel the satisfaction of achievement as well through the recognition of a job well done. Even in challenging working conditions, it is important to maintain a positive attitude in order to move forward and that is something I can bring to your team. Throughout my work at Capita, the key to my success was from building and maintaining strong relationships. I could not have achieved my quarterly targets without the hard work I put in to managing each role and the support from the agencies I engaged with. I value teamwork immensely and respect every individual I work with for the different experiences and knowledge we each hold. All of which helps to improve and grow a successful business. I work to a can-do attitude and take ownership of all the responsibility I am given and always strive to find the best solutions for both clients and businesses I work for. I believe previous experience, enthusiasm and strong work ethic are what I would bring to your team to make a difference.

- **Technology Competency**

My daily life always gives me access to a computer. I have used IMS (Information Management Systems), Payroll System, Microsoft Office Systems and Sage Accountancy Package when progressing through the AAT course. I am the first to put myself forward for training courses as required and I'm not opposed to funding my own training because I think continued learning is always a benefit.

- **Communication**

Although I do not currently speak Welsh, I have started an online Welsh class in order to learn the language. I can effectively communicate with all levels of management, peers, internal and external clients and candidates both through verbal, written and face to face means.

Thank you for taking the time to consider me for this position

Kind Regards

Philippa Tuck

Please attach any relevant documents here:

Referee 1

Name:	Lorraine Wickens
Job Title:	Supply Chain Specialist
Company Name:	Capita
Company Address:	Reading Bridge House, George Street, Reading, RG1 8PJ
Telephone Number:	07585404430
E-mail Address:	lorraine.wickens@capita.co.uk
Do we need to contact you before seeking this reference?:	Yes

Referee 2

Name:	Gary Grimes
Job Title:	Manager
Company Name:	Skyblue, Carillion
Company Address:	No Longer Trading
Telephone Number:	07891567238
E-mail Address:	tbc
Do we need to contact you before seeking this reference?:	Yes

Additional Information

Do you have any public service or voluntary/business commitments?: No
If yes, please give details:
Do you speak Welsh?: No
If yes, to what level?:
To your knowledge are you related to any member of staff or Board Member within the organisation (including ateb group, West Wales Care & Repair, Mill Bay Homes)?: No
If yes, please state name and relationship:
Have you been convicted of a criminal offence which is not a spent conviction under the Rehabilitation of Offenders Legislation: No
If yes, please provide details of the offence, date and conviction and sentence imposed:

Depending on the nature of the vacancy being applied for, employment may be subject to a satisfactory disclosure from the Disclosure Barring Service. Information received will be treated in strictest confidence and will generally only be retained by the Group for a period of 6 months or for as long as is deemed necessary. A criminal record will not necessarily be a bar to obtaining employment with the Group. Depending on the nature of the vacancy you may also be required to sign a declaration of past convictions

Please provide dates of any pre-arranged holidays or any dates that you will not be available for interview:

I consent to ateb group limited using and keeping information I have provided on this application or elsewhere as part of the recruitment process and/or personal information supplied by third parties, such as referees, relating to my application, for future employment for a period of 6 months if I am not successful. (Please note that the information you provide on this application form will be kept indefinitely on our database unless you tell us otherwise). I understand the information provided will be used to make a decision regarding my suitability for employment and, if successful, the information will be used to form my personnel record and will be retained for the duration of my employment and as long

as is deemed necessary thereafter.

I confirm the above information I have supplied is correct. I understand that false information or deliberate omissions will cause my application for employment to be unsuccessful or, in the event of employment, render me liable to immediate dismissal without notice or pay in lieu of notice:

I agree

Education & Qualifications

Please give details of schools, colleges, universities etc. in chronological order starting with the most recent first. Please note, that you will need to provide original certificates (which are relevant to the post you are applying for) if you are invited to an interview.

School/College/University::	Epping Forest College
Dates (From - To)::	July 2010
Course title, exams taken and results/grades::	City and Guilds Accounts and Bookkeeping First Class Pass
School/College/University::	University of Hertfordshire
Dates (From - To)::	sept 2005 - 2009
Course title, exams taken and results/grades::	BA (Hons) Business Studies, Degree Class 2:2
School/College/University::	Davenant Foundation School
Dates (From - To)::	sept 1998 - 2005
Course title, exams taken and results/grades::	A'Levels and GCSE's
Additional Education Information::	

Employment Details

Present/ most recent employment

Name and address of Employer::	Ateb Group
From (Choose date)::	January 2020
To (if present, leave blank)::	
Job title::	People Advisor
Key duties::	Project based work to update processes and documents inline with new branding
Period of notice::	1 Month

Employment details continued

Previous employment (most recent first). Please provide details of any gaps in employment together with reasons for these.

Name and address of	The Ferry Inn, St Dogmaels
----------------------------	----------------------------

employer::	
Job title::	Front of House Staff
Date (From - To)::	Aug 2018 - Dec 2019
Reason for leaving:: More suitable position to my previous experience employed for	
Name and address of employer::	Barefoot Conservation
Job title::	Marine Conservation Volunteer
Date (From - To)::	Aug 2018 - May 2018
Reason for leaving::	It was my choice to volunteer for this length of time
Additional information:: During this time I completed volunteer work and travelled abroad	

Applicants letter inviting to interview offering reasonable adjustments

Message Centre | Stats | Forms | Users

Messages

ateb Application

To: [REDACTED]
Sent on 13/02/2020 at 11:37

Dear [REDACTED]

Re: Post of Finance Assistant (Fixed term contract: 12 months x 2)

Further to your application for the above post we would like to invite you to attend an interview at Meyler House, St. Thomas Green, Haverfordwest on Tuesday 18th February 2020. Please visit http://www.atebgroup.real-job.co.uk/interview_booking/1600/04f62e/ to book your interview with us.

You should allow approximately 1 hour 15 mins for your interview; included in this will be an excel test lasting 30 mins, interview lasting no more than 30 mins followed by a 15 mins coffee and chat with a group of colleagues who work closely with this role.

You will be interviewed by Ms Kate Allen - Finance Accountant, Mrs Bethan Elliott - Finance officer (Payments & Collections) and Mrs Joanne Thomas - People Advisor.

Please bring with you to your interview the following original documents:

- * Passport or Full Birth/Adoption Certificate
- * Official document giving your full name and address
- * National Insurance Number and name
- * Driving Licence
- * All original certificates relevant to your application.

If you have a disability, which may require us to make reasonable adjustments for your interview, please let us know how we can assist you.

Would you please contact me on 01437 776952 if you are unable to attend the interview?

Applicants letter inviting to interview requesting qualifications and immigration proof

Message Centre | Stats | Forms | Users

Messages

ateb Application

To: [REDACTED]
Sent on 13/02/2020 at 11:37

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Email Templates

Template name	ateb - Provisional Offer
Use template on direct contact?	☐
Send from anonymous (no-reply) address	☐
Insert merge field	- please choose - ▼
Subject	ateb Application - Provisional Offer
Content	Re: Post of %vacancy% “ Provisional Offer Further to your conversation with Victoria Evans, HR Manager, I am pleased to confirm the offer of the above post. This offer is subject to receipt of satisfactory clearances, which <u>ateb</u> are currently seeking. These are as follows: (delete as appropriate) • References which are, in our opinion, satisfactory • Health clearance which is, in our opinion, satisfactory • <u>DBS</u> clearance which is, in our opinion, satisfactory • Full UK driving licence and valid business insurance • Evidence, which in our opinion is satisfactory, of the following qualification • Other --please specify All appointments will be subject to board approval where the applicant has previously worked for the group in the last 12 months. <u>ateb's</u> decision is final as to whether these clearances meet our requirements. Therefore I would advise you not to hand your notice in with your current employers until we are in a position to confirm your offer. Please note that this job offer is based upon the information disclosed to us during the selection and interview process. Should we later find out that material information that would affect our decision has been withheld from us, we retain the right to withdraw the job



STRICTLY PRIVATE & CONFIDENTIAL
FOR ADDRESSEE ONLY



24/02/2020

Dear 

Re: Finance Assistant (Confirmation of Offer - Fixed Term to 24th April 2021)

Further to our recent conversation, ateb group is pleased to offer you the above post. We trust that your knowledge, skills and experience will add value and help the Group meet the needs of our tenants. Your salary will be £21,006 per annum. The post is subject to a six-month probationary period and your first day of work will be on Monday, 27th April 2020.

We trust that your knowledge, skills and experience will add value and help the Group meet the needs of our tenants.

All appointments will be subject to board approval where the applicant has previously worked for the group in the last 12 months.

We hope that you will enjoy working for the Group in your new role.

Yours sincerely

Kate Houston

People Advisor

T: 01437 776952

E: kate.houston@atebgroup.co.uk

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

 01437 763688  hello@atebgroup.co.uk  atebgroup.co.uk



Statement of Main Terms & Conditions of Employment

EV. 51

ateb
*better living
solutions*

The Group/we/us/organisation	ateb group limited
Name and address	[REDACTED]
Post title	Finance Assistant. See clause 2.
Department	Finance & ICT.
Location	Your usual place of work will be: Meyler House, St Thomas' Green, Haverfordwest, Pembrokeshire, SA61 1QP, however you may occasionally be required to work at any other business premises of the Employer or its customers/suppliers within a reasonable daily commuting distance from your home place of work.
Salary	£21,006 per annum. See clause 4.
Hours	37 hours over 5 days, Monday to Friday. See clause 5.
Start date	27 th April 2020
Continuous employment	6 th January 2020
Fixed term until	16 th April 2021. The contract may however be terminated early in line with the notice provisions detailed in clause 3.
Annual leave	The annual leave year runs from 1st January to 31st December. Your annual entitlement is 30 days. In addition to this you will receive 8 bank/public holidays plus 3 additional days to be taken as advised by the Group. The timing of the 3 extra days is entirely at the discretion of the Group. Your entitlement will be pro-rated according to the number of hours you work. Please see clause 6.
Additional payments	N/A
Probationary period	The first six months of your employment will be on a trial basis and the organisation reserves the right to terminate your employment either during or at the end of that period on one week's written notice. The organisation reserves the right to extend the probationary period. If you are absent from work due to incapacity during your probationary period for a period which exceeds one week your probationary period will be extended by the period of your absence to allow adequate monitoring of performance. We reserve the right during your probationary period and the first 24 months' of your employment to not apply the Group's Disciplinary and Capability Procedures.
Uniform	You are not required to wear a uniform whilst undertaking your duties.
Driving Licence	You are not required to hold a valid driving licence for your employment.

The Group offers employment on the terms and conditions set out in this Contract and subject to receipt of satisfactory references/clearances, evidence of eligibility to work in the UK and evidence of appropriate qualifications [including an appropriate, clean driving licence].

Acceptance

This document and written acceptance will constitute your contract of employment.

If you agree to accept the appointment on the terms specified, you should sign one copy of this contract in the space provided at the bottom of this page and return to People & Communications. Copies of your contract and the reference documents referred to within it, will be available for inspection at all reasonable times in the People & Communications Department and are available on the Group's intranet site. You agree to familiarise yourself and comply with these documents and any policies and procedures issued by us from time to time.

Signed on behalf of the group (Nick Hampshire, Group Chief Executive):

_____ Date: ____ / ____ / ____

Signed – _____):

_____ Date: ____ / ____ / ____

There are no collective agreements affecting your terms and conditions of employment. Any changes or amendments to your terms and conditions will be confirmed in writing within one month of them occurring.

1/ Continuous Employment

Your employment in this post will commence on the start date detailed above and any continuous period of employment with the Group is detailed above. Your continuous previous service will be recognised as reckonable service in respect of redundancy, maternity, sick pay and annual leave.

2/ Post Title

You must undertake all duties associated with your post title and you may be required to undertake any additional or other duties in other departments according to the needs of the Group from time to time.

During your employment with us you must devote the whole of your working time and attention to the performance of your duties and you must not work for any other business or company without our prior consent, which will not be unreasonably withheld.

3/ Period of Notice

After 1 month but under 6 months' service you are required to give the Group 1 week's notice to terminate your employment. Thereafter you are required to give 1 month's notice.

You are entitled to receive the following periods of notice from the Group:

Over 1 month but under 6 months' service – 1 week

Over 6 months' but under 5 years' service – 1 month

Over 5 years' continuous service – 1 week for each complete year of service to a maximum of 12 weeks after 12 years.



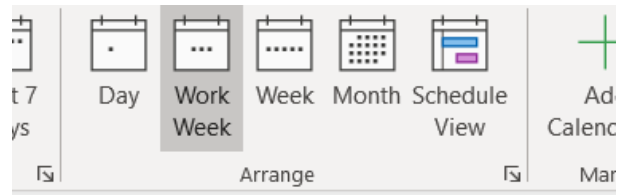
Recruitment Checklist

Complete Advert, Applicant letter, Recruitment pack and Role Profile	
Harbour – use Harbour advert wording from previous recruitment.	
Website (use www.atebgroup.real-job.co.uk)	
LinkedIn ateb page – include link to ateb website	
LinkedIn – share on your profile	
Yammer – CHC – include link to website	
Yammer – ateb All Company page	
Indeed – include link to ateb website in bold so users know to apply on our website	
Facebook	
Print hard copy recruitment pack	
Send out questionnaire via Survey Monkey	

Diary snippet of closing date for Finance Assistant

Today		<	>
Monday			
10			
	Shortlisti	Week	
10:00	- Finance Assistant	Board	Victori
	Room 64	Catch	
11:00	Kate Allen		
12:00			
13:00			
14:00			
15:00			
16:00			
17:00			

Diary snippet booking interview, test and coffee and chat rooms for Finance Assistant



February 2020

Tuesday	
18	
ee(Tei	Interview Board Room Kate Houston Coffee and chat for Finance Assistant Board Room Annex Kate Houston Interview test Finance Assistant Room 61 Kate Houston College phone call from verifier Phone call from lecturer

Timetable : Finance Assistant – 18th February 2020

Time	Interview	Test	Coffee and Chat
09:15			Candidate 1 begins
09:30		Candidate 1 begins	Candidate 1 ends
09:45		Candidate 1	Candidate 2 begins
10:00	Candidate 1 begins	Candidate 1 ends Candidate 2 begins	Candidate 2 ends
10:15	Candidate 1	Candidate 2	Candidate 3 begins
10:30	Candidate 1 ends Candidate 2 begins	Candidate 2 ends Candidate 3 begins	Candidate 3 ends
10:45	Candidate 2	Candidate 3	Candidate 4 begins
11:00	Candidate 2 ends Candidate 3 begins	Candidate 3 ends Candidate 4 begins	Candidate 4 ends
11:15	Candidate 3	Candidate 4	BREAK
11:30	Candidate 3 ends Candidate 4 begins	Candidate 4 ends	BREAK
11:45	Candidate 4	LUNCH	BREAK
12:00	Candidate 4 ends LUNCH	LUNCH	BREAK
12:15	LUNCH	LUNCH	Candidate 5 begins
12:30	LUNCH	Candidate 5 begins	Candidate 5 ends
12:45	LUNCH	Candidate 5	Candidate 6 begins
13:00	Candidate 5 begins	Candidate 5 ends Candidate 6 begins	Candidate 6 ends
13:15	Candidate 5	Candidate 6	LUNCH
13:30	Candidate 5 ends Candidate 6 begins	Candidate 6 ends	LUNCH

Diary snippet of blocking out time to shortlist for the Finance Assistant

[illegible]

Interview Matrix
Finance Assistant - 18th February 2020

Question	Name:	1	2	3	4	5	6
1	ateb knowledge	2 ₁	3 ₀	2 ₁	2 ₁	2 ₁	2 _{1/2}
2	Attraction to post	4 ₃	1 ₂	2 ₃	4 ₃	2 ₀	3 _{1/2}
3	Current role/ responsibilities	3 ₃	1 ₀	3 ₀	3 ₀	2 ₃	4 ₀
4	Experience - Spreadsheets/ finance system	4 ₁	1 _{1/2}	3 _{1/2}	3 ₁	1 ₁	4 ₀
5	Scenario - Customer service/ problem solving	5 ₁	3 ₀	2 ₀	3 ₁	2 ₁	4 ₀
6	Change culture	4 ₁	1 ₀	3 ₀	4 ₁	3 ₀	3 ₀
7	Team work	5 ₁	2 ₁	2 ₁	5 ₁	2 ₁	3 ₁
8	DNA - flexibility	4 ₂	2 ₀	2 ₄	4 ₃	3 ₂	4 ₁
9	Working to own initiative	5 ₁	1 ₀	1 ₁	3 ₁	2 ₁	3 ₁
10	Personal attributes	4 ₁	2 ₀	2 ₀	5 ₀	2 ₀	4 ₀
11	DNA - communication	5 ₀	1 ₀	2 ₀	4 ₀	4 ₂	3 ₀
Total		45 ₁₅	18 _{3 1/2}	24 _{14 1/2}	40 ₁₈	25 ₁₂	37 ₄

Scoring – candidates answers should be scored as follows:

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

Interview Matrix

Finance Assistant - 18th February 2020

Summary of reason for appointing or not, linked to criteria:	
	Relevant answers. matched DAA & matched job requirements Relevant experience.
	Not answering questions said weak Excel skills. No financial experience focus - GST focus.
	Good interview. Good personal attributes and good answers Lacking a little experience (or not presented)
	Good DAA attributes Not much finance/accounting experience - more about personal money - would be more suited to M&D role

CANDIDATE'S NAME: [REDACTED]

1. What do you know about ateb?

PHA - Build better living solutions. keep in development.
New builds. Support individuals

2. What has attracted you to this post? If currently employed why are you leaving your current job?

Interest in Finance. Made-pm all business. All roles have had elements of Finance - Payroll, process payments/timesheets, queries, credit card reconciliation - check budget it can make a payment.
Like ateb, want to stay.
AAT - started but didn't finish - derecognition - did it to improve self + understand Finance.

3. Could you tell us what your current role and responsibilities are?

HR dept - P+C.
Project work, updating paperwork, updates P+P, update systems, suggestions of better way of working. PIP spreadsheet fixed.

4. What experience do you have working with spreadsheets and /or finance systems?

Payroll / timesheets on SS + different systems.
Input data, make sure details are correct.
Dipped into SAGE for learning but not day to day - but can learn. Filtering / sorting SS - daily. HR Exp - always used recruitment data on SS.



Recruitment & Selection Process

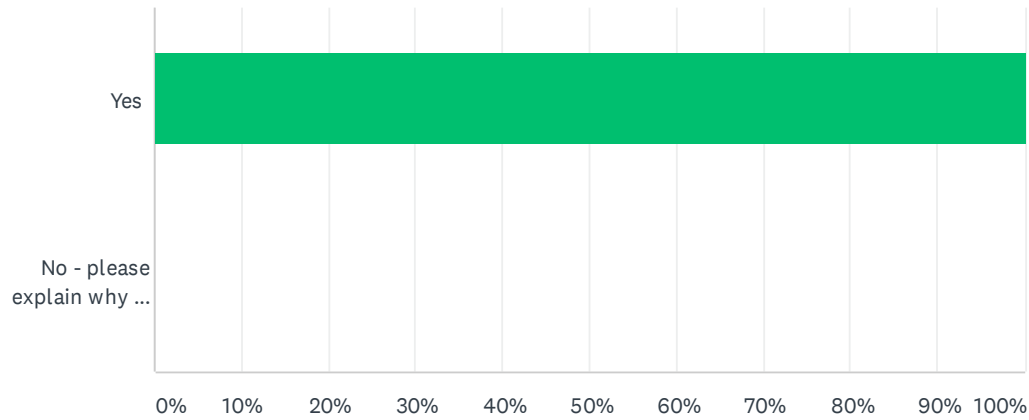
1	Manager requests recruitment/team member leaves	
2	People Team to send recruitment brief, induction plan template and previous interview questions/assessments to manager	Same day as request
3	Recruitment brief is returned to and agreed with People Team	
4	People Team to book rooms and panel/coffee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

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

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

Q1 Did our recruitment process live up to your expectations?

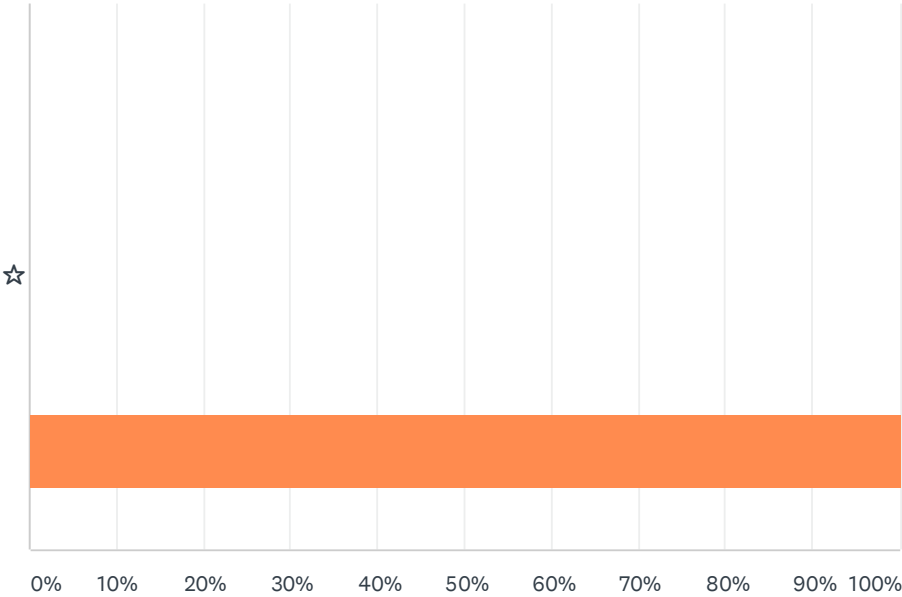
Answered: 4 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	4
No - please explain why and what we can do to improve our process.	0.00%	0
TOTAL		4

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

Answered: 4 Skipped: 0

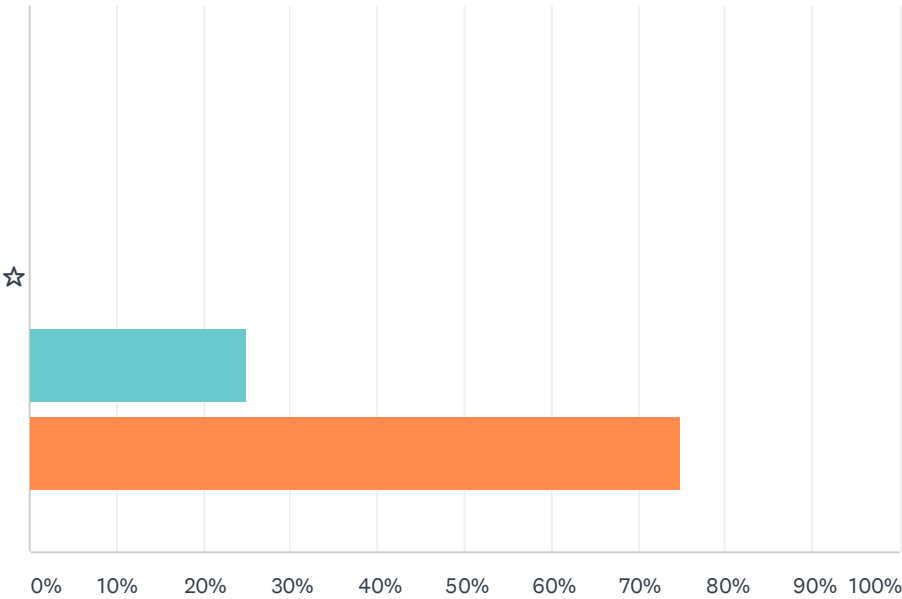


1 2 3 4 5

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

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

Answered: 4 Skipped: 0

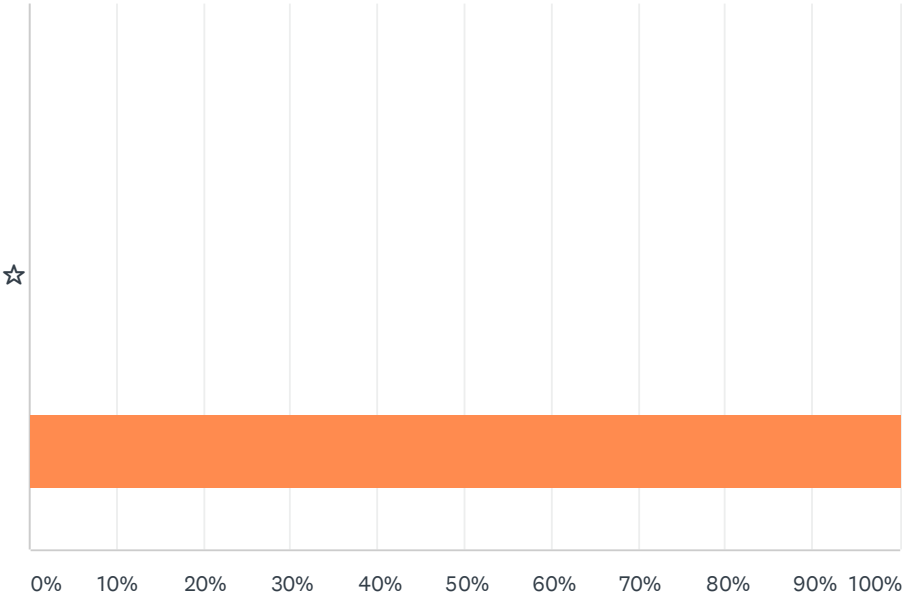


1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	25.00% 1	75.00% 3	4	4.75

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

Answered: 4 Skipped: 0



1 2 3 4 5

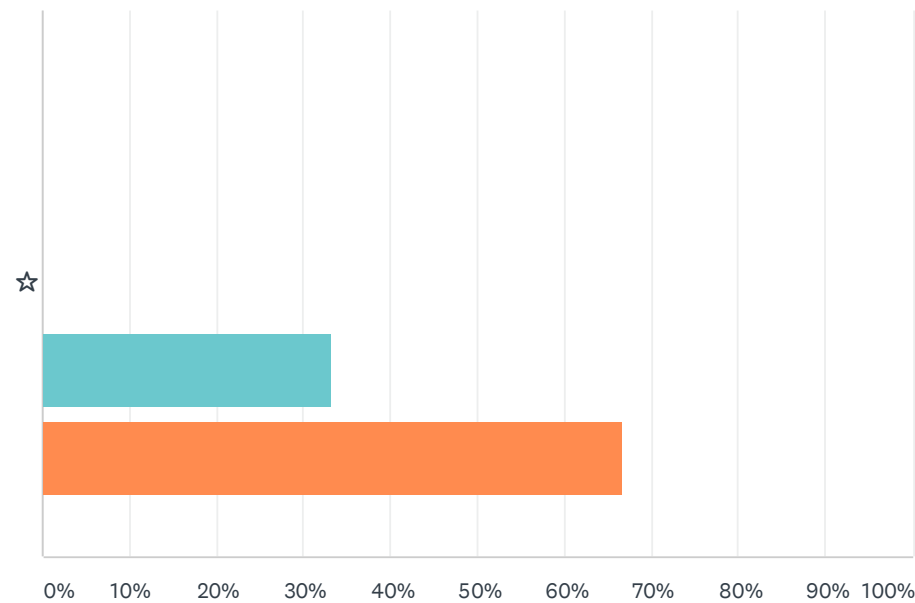
	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 4	4	5.00

Q5 Please provide any additional feedback in the box below.

Answered: 3 Skipped: 1

Q1 How satisfied were you with the support received from the People & Communications Team during your recruitment activity? 5 being extremely satisfied, 1 being unsatisfied

Answered: 3 Skipped: 0

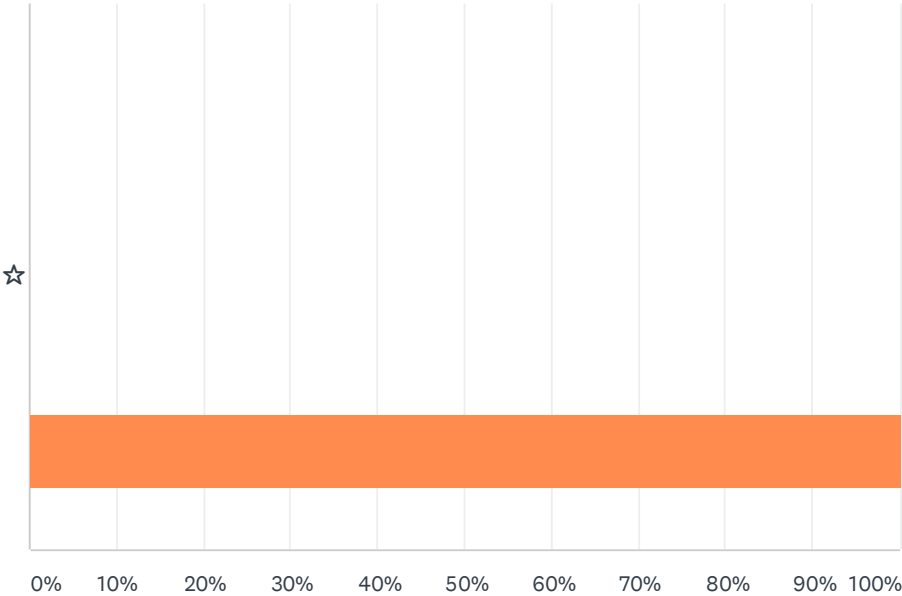


1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	33.33% 1	66.67% 2	3	4.67

Q2 How satisfied were you with the recruitment pack provided by the People & Communications Team? 5 being extremely satisfied, 1 being unsatisfied

Answered: 3 Skipped: 0

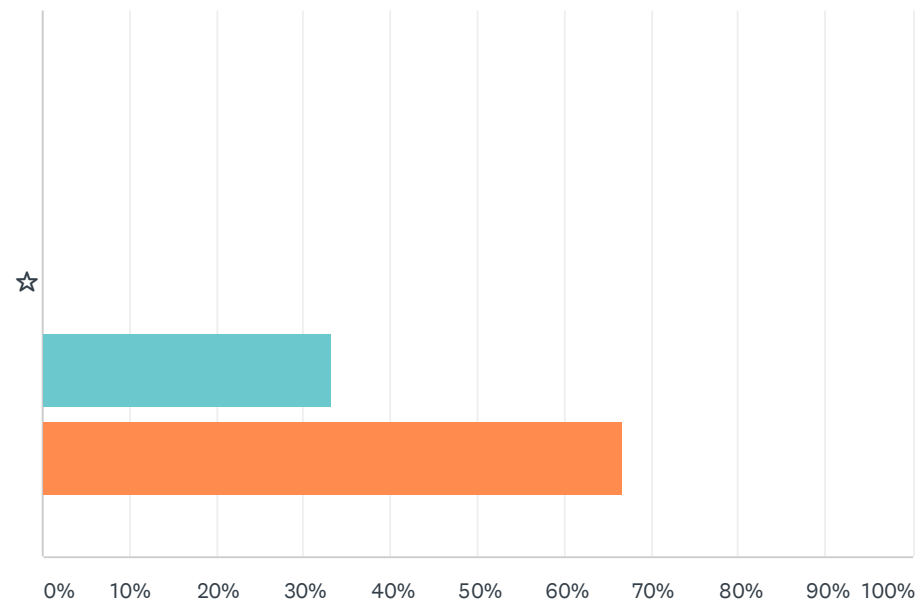


1 2 3 4 5

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

Q3 Overall how satisfied were you with the recruitment service provided by the People & Communications Team? 5 being extremely satisfied, 1 being unsatisfied

Answered: 3 Skipped: 0

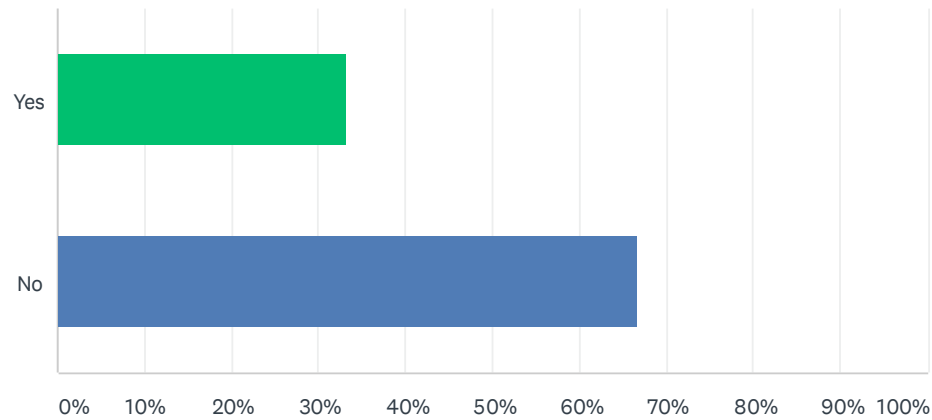


1 2 3 4 5

	1	2	3	4	5	TOTAL	WEIGHTED AVERAGE
☆	0.00% 0	0.00% 0	0.00% 0	33.33% 1	66.67% 2	3	4.67

Q4 Do you think we could make any improvements to the service we provided?

Answered: 3 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	33.33%	1
No	66.67%	2
TOTAL		3

Q5 If you answered Yes to Q4 please provide us with your suggestions

Answered: 1 Skipped: 2

65	Action	30/06/2020	SDP	Pending	Work with Phillipa to support her in the review/update of our P&Ps	There are some documents that will need a legal input so please support Phillipa with these 25/2 Changed slightly due to EIA work that Tori is doing. Once the new template has been agreed with NH then we will reallocate work and timescales
66	Action	ongoing	SDP	Pending	If having problems with deadlines then please come and see me ASAP	This is something that I do with Nick; our workload changes and we are impacted by customers' demands; if these impact on deadlines this is completely understandable. Do not be afraid to come and see me so we can look at workload and reassess deadlines and priorities 25/2 did flag demands with me which is great, more than happy to reassess objectives, I did this with Nick
67	Action	31/03/2020	SDP	Pending	Breathe - outstanding queries and amendments	Need to ensure that the amendments are agreed, updated in HR.Net and Suzanne is advised where appropriate. Split up the areas with Kate 25/2 still some records with information missing, double check to see what is on there
68	SPOT	ongoing	SDP	Achieved	Introduction of Breathe	Well done on implementing this and the training. We had a tight timeline to complete this. I appreciate the work that went into this
69	Action	16/04/2020	SDP	Pending	Undertake a review of 2019/20 sickness, identifying trends in short, medium and long term sickness, trends in relation to causes of sickness absence and any trends in departments or teams	I am concerned as to the increase in sickness and it will be interesting to get an idea as to what is behind this 25/2 Just make sure that you are strict wit yourself and book some quiet time to do this, allow yourself plenty of time. Your idea to do Jan and Feb now is a good one as we are using Breathe which is a new system
70	Action	01/04/2020	SDP	Achieved	Set up a spreadsheet on the People Management Service hub to record the key information coming out of the new exit questionnaires	Develop a draft and let me see, we can agree what we want to share with Board on our reports then 25/2 completed, if you could e-mail me this so I can look to see what we will use as part of the service hub performance reports for 20/21
71	SPOT	17/01/2020	SDP	Achieved	SPOT From Beth Elliot "Can I give Kate a SPOT please. This is only the second one I have given – I don't give them out unless I feel a bit of a "wow" factor. Kate has been so helpful and supportive recently with recruitment and staffing issues. She has been very knowledgeable and given sound advice. She has been very professional and I am really impressed to he honest"	Well done Kate you should be really pleased with this positive feedback
72						

#2

COMPLETE

Collector: Finance Assistant 2020 (Web Link)
Started: Tuesday, February 25, 2020 11:07:21 AM
Last Modified: Tuesday, February 25, 2020 11:07:37 AM
Time Spent: 00:00:16
IP Address: 104.98.116.164

Page 1

Q1

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

☆ 5

Q2

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

☆ 5

Q3

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

☆ 5

Q4**No**

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

Q5**Respondent skipped this question**

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

#3

COMPLETE

Collector: Finance Assistant 2020 (Web Link)
Started: Tuesday, February 25, 2020 12:48:37 PM
Last Modified: Tuesday, February 25, 2020 12:49:15 PM
Time Spent: 00:00:37
IP Address: 23.15.241.214

Page 1

Q1

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

☆ 5

Q2

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

☆ 5

Q3

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

☆ 5

Q4**No**

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

Q5**Respondent skipped this question**

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

Gibb's Reflective Cycle – reflection model on own performance

Step 1 – Description

I was responsible for recruiting and selecting 2 x Finance Assistant roles. This was during a busy period within my own team; high recruitment which was unprecedented and normal workload and duties which had increased during recent months.

The recruitment was time-specific like most recruitment but this was at a time where the Finance Team had lost three employees; one of which was a senior position nearing the financial year-end.

Involved in the process was the Chief Executive, People & Communications Manager, Finance Manager, Finance Officer and Financial Accountant.

I had to plan and prepare the recruitment from drafting advertisement to successfully recruiting for the position. I dealt with all administration and took an active role as panel member in selection.

The panel successfully recruited for both positions and the process was efficient.

Step 2 – Feelings

Consider what you were thinking and how you felt before the experience.

I was feeling stressed with workload pressures and high recruitment; mixture of newly devised positions and existing roles vacant. I deal with all the administration for the posts I advertise together with being an active panel member therefore recruitment is time-consuming. I had one other recruitment live, my colleague also had a live- recruitment and I was asked to step-in and interview filling in for my colleague due to it being the school half-term and my colleague having annual leave. I too had annual leave over this time and not only was the Finance Assistant position close during this time there was a short turn-around and interviewing was taking place at the end of the school half-term.

How did you feel during the experience?

I wanted to provide a good service and make the process as efficient as possible assisting the line-manager and the recruitment panel whenever possible to seek the best-fit candidates to the roles and Ateb's DNA.

I felt that I was under-pressure to fit in with timescales the Finance Team wanted. I felt they had no regard for the People Team and our busy workloads, scheduled annual leave and the fact it was the schools half-term. I voiced my concerns for my team, myself and for the recruitment process; I was unsure whether we would receive a good amount of applications as the roles were fixed-term contracts and it was set to close in the middle of the half-term with interviews scheduled again within the half-term period. My manager listened to my

concerns however, in the end the Finance Manager who wanted the recruitment to be scheduled immediately had his way.

I felt frustrated at this as the posts had been vacant for several weeks and there had been no movement. I offered alternatives like extending the period of time the advertisement was live instead of two weeks have the position run a little longer overlapping the half-term and ending after 2.5 weeks or 3 weeks.

How did you feel after the experience?

I felt the positions could have been advertised internally first. This would have in fact saved the organisation a lot of time and been more cost effective.

Both positions were filled by existing employees both on fixed-term contracts that were due to expiry. This has now resulted in two teams at Ateb having to back-fill these positions and the likelihood is slim to recruit for such short-time.

I was still dissatisfied that our Team had to adapt and that our Manager never backed us up. This is something I reiterated in my Achieve which is a continuous performance feedback review. I understand that filling vacancies is important and is time sensitive, but the Finance Team left it to the last minute, did not or was unwilling to listen to constructive feedback and were only concerned with their needs.

Whilst I was on annual leave, I spent time shortlisting the candidates to allow me to meet with the panel on my return and arrange interviews within the specified time constraints.

Step 3 – Evaluation

I believe the recruitment was successful and I provided a good service. This was evident with receiving a SPOT from the Finance Officer.

I believe I supported and guided the Finance Officer well throughout the process as she was new to recruitment and selection. I used information I independently sourced using the internet to describe the shortlisting, interview process and what is meant by unconscious bias.

When shortlisting and then interviewing collectively I challenged the panel members noting inaccuracies of their decisions. I did this in a friendly manner.

The recruitment was not entirely successful; we did not have the same calibre of candidates as we have had previously. This could be a result of the positions being fixed-term and due to the position closing within the half term. If the two existing employees had not applied, we would not have filled these positions so well; fitting to the role, culture and values of Ateb.

My manager assured me that with future recruitment the team would be better protected, and she understood my argument that it put my colleague and I under pressure.

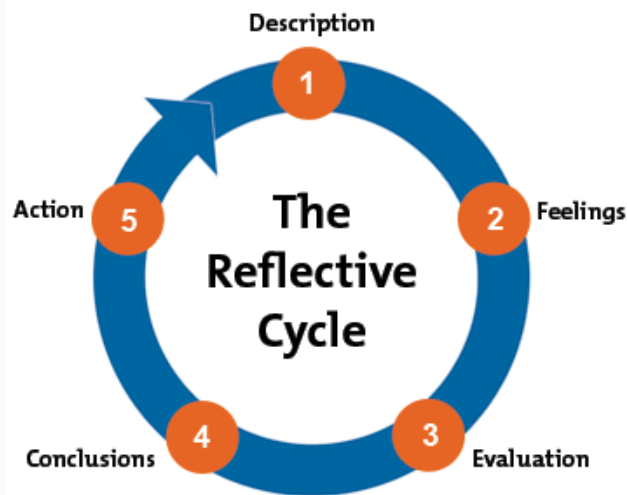
Step 4 – Conclusions

- To look at internal labour in the first instance.
- To challenge more ensuring my voice is heard. I had valid points.
- I provide an efficient and time specified process.
- I support the recruitment well.

Step 5 – Action

Skills to improve:

- My negotiating skills with senior employees and ensuring my voice is heard.



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