

CIPD Diploma in Applied Human Resources

Contributing to Coaching and Mentoring in the organisation

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CIPD Membership Number: 53581196

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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: *SL Cosker*

Date: 14.03.2021

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Evidence Matrix

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Student Number: 1905443			CIPD Membership: 53581196
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- 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:

SL Cosker

Date:

14.03.2021

Personal statement for learning outcomes 1 & 2

Since starting with Tai Tarian in December 2017, I am not or have not been aware of a policy or procedure which relates to coaching and mentoring within the organisation. Having met with the Learning and Development manager they also confirmed that this was the case but is something that they would like to push forward in the coming months and that was being worked on behind the scenes. As part of gathering information for this portfolio I spoke with the Manager of the Learning and development section **(EV1)** and reached out to 3 managers, asking the same questions around coaching, and mentoring at Tai Tarian to gather some more insight from a manager's perspective **(EV2 - 4)**.

In 2018, the organisation launched their own leadership programme for managers, this was called leadership 5:3:5. Booklets were devised with a snapshot guide of the training **(EV5)** and were encouraged to be used, along with Tai Tarian Behaviours framework **(EV6)**, as tools to help support all managers, but investigation shows that neither mention coaching nor mentoring specifically. Although, a further part, off the back of the 5:3:5 training delivered at the time, was the optional offer of 2 coaching sessions for managers to upskill on the importance of coaching and mentoring their teams going forward.

The coaching was provided by an external independent coach, and whilst it did receive positive feedback the uptake was from just a quarter of all managers. When I queried why this was optional and not a mandatory learning session at the time, the answer was unknown, and was nothing to do with financial constraints as far as the Learning and development manager was aware. To ensure all managers are working towards the same goal and have the same knowledge the approach of 'optional' seems questionable. If this is to be re-launched, I feel it would be more appropriate as a mandatory expectation at manager level, if financially viable, thus working towards creating a coaching culture (Bingham,2016).

After the initial delivery of the 5:3:5 training the learning and development team went through dramatic change and the key team leader pushing the 5:3:5 programme left the organisation, soon the programme fell off the organisation's agenda. Fast forward to now and a re-structure of the Learning and development team, and due to the demand of other hot topics, such as providing online training during a pandemic, just like many other organisations (Brown,2021) and this is only beginning to be looked at again.

The 2 coaching sessions would have provided a good start or basis to develop managers skills, but without follow up may have resulted in this being a potential waste of time and not given the manager enough information on the specific skills such as questioning, listening, clarifying, and reframing (CIPD,2020) needed to be a good coach or mentor.

During the meeting, the Learning and Development manager mentioned that the external coach is still available, if requested, to work with managers on specific topics they feel they

may need help with. I was unaware of this and when asked where this is promoted, the manager confirmed that it is something that is simply not broadcasted and used as an ad-hoc service if a need is brought to their attention. The manager mentioned that they had used the service themselves when transitioning from being a manager of the HR department to then managing the Learning and development department. The service had also been used to try and develop leadership skills when a manager's lack of capability was highlighted.

The lack of transparency to employees that we provide this service, I found frustrating, and that even the HR team were unaware to promote and even identify a need and make the Learning and Development team aware. This also highlights that there is lack of communication between the HR and Learning and development team that needs to be addressed going forward for the benefit of the employees and the organisation overall.

From working closely with managers daily, I feel many have lost out and could have benefited with this support – especially in relation to the transition of supporting their teams online, working from home during the pandemic. Or for those staff that have been promoted to team leaders for the first time with no management training – as the leadership 5:3:5 training had launched and then abruptly discontinued.

From time working with managers, I am aware that coaching and mentoring takes place daily on an informal basis throughout all departments. The only qualified coach and mentor within the organisation is the Head of Organisational Development, who does offer sessions if needed, but cannot commit due to job demands to provide a regular coach/mentee provision.

Looking at the learning and development policy (**EV7**) I can see that it is very basic and does not have anything specific within it that relates to coaching and mentoring. This is not a surprise given the lack of formal coaching and mentoring in the organisation, or the lack of knowledge and information available about the coaching that can be provided from an external provider as previously mentioned, which can cause issues amongst itself, if seen as being “secret” or not available to all (Taylor and Wilkinson, 2016).

The policy notes that certain procedures will be governed under the framework of this policy, which include the:

- Learning and Development Procedure (**EV8**)
- Leadership 5:3:5 (**EV5**)

When I looked at each, I discovered that the Learning and Development Procedure briefly mentions coaching and mentoring as a way of learning, with no other information.

The one-to-one guidance (**EV9**) which was a part of the 5:3:5 training briefly mentions questions around line managers building relationships and highlights the “conversation

style as that if a Coach, highlighting that the conversation in this instance should be 30% of the manager , 70% of the team member.

I considered the results of Tai Tarians most recent engagement survey, and found there were two specific questions for managers, along with the option to comment in a free text box, 50 out of the 98 participants were management. From these the results showed that 24 managers feel they always have the appropriate tools/training to support their team showing positivity but a high number of 17 only sometimes feel they do have the appropriate tools/training, with 7 not sure, 2 never feel they do. The results suggest that there is an issue amongst managers , feeling unsupported and unable to do their jobs as well as they can **(EV15)**. This is shown again, with nearly double the number of managers stating they would like more manager training to support their teams with 33 managers wanting more comparing to only 17 who do not **(EV16)**. Out of 50 managers, 13 left comments which vary, but the general theme from them suggests that there has not been any manager training for a while, with nothing provide for recent / new managers, along with a need to provide specific guidance on supporting and engaging teams whilst working remotely in the current pandemic and going forward **(EV17)**.

Considering the specific questions for managers and their comments, there is a clear need for training and support - If managers feel they do not have adequate training, tools, and support to give their teams this will affect their capabilities to manage their teams successfully.

Andriotis (2016) states *“one of the biggest causes of demotivation, however, is the relationship between managers and their teams”* investment in line manager coaching in relation to communication, listening, trust, the importance of coaching and mentoring and engaging their teams is needed.

Investing in training for this will far out way the cost, with benefit of staff development and capability, in turn employees *“are more likely to go ‘beyond contract’ or that ‘extra mile’ for the organisation if managers behave in ways that stimulate and encourage positive attitudes”* (Purcell et al,2013) to work towards organisation goals and increase output and revenue (ACAS,2020) which are the outcomes of an organisation with higher engagement.

On a positive note, during the meeting, the L&D manager confirmed that they are looking to roll out a revised version of the previous 5:3:5 training **(EV18)** shortly, delivered over a 2-year period and is hoped to be accredited. If this is followed through this will be a massive step towards creating a much needed “coaching culture” (Bingham,2016) going forward. This version of the Leadership 5:3:5 **(EV18)** has information about coaching and mentoring and mentions the use of 2 coaching sessions and 2 mentoring sessions for each staff, although the specific on content are not included.

To add value to an organisation the implementation of coaching and training packages should relate to and align with organisational objectives, values, and goals; giving clarity and make training relatable to staff and what the organisation is about – to truly onboard a “coaching culture” (Bingham,2016), looking at the revised content **(EV18)**, again I can see this has been thought out by related to Tai Tarians behaviours framework **(EV6)** and that the corporate plan and strategy also highlights “*Developing people*” as one of its 4 key goals **(EV19)**.

After a restructure in the HR team of the implementation of two HR business partners, and two HR advisors, the implementation of new ways of working, policy development and a large focus on building relationships , repour and trust across the organisation has been the priority for the HR team. Previously the HR department was thought of as a negative throughout the organisation. The current team have worked very hard over the last 18 months to change this view, and we have seen a massive improvement , being asked for advice and support, and seeing certain managers thrive – especially those who had previously had the “we have always done it this way view” (Kotter,2016). A large part of this has been manager coaching and guidance by the HR team, building much needed confidence to complete tasks that prior were not allowed or even trusted to do (as the HR team would complete tasks which now sit with managers). When building these relationships, the HR team identified inconsistency across different departments, there was a massive gap in different thought process, some managers clearly were strategic thinkers, some not so. The team found that there was a need to encourage more senior managers to leave the day-to-day operational tasks to their operational supervisors and team leaders, increasing their competencies to decision make.

The HR team and I have devised various templates to support managers during our meetings and catch ups with them used to not only to ensure the HR team are using the same approach and message to all but are also a good tool to use as a basis to encourage management contribution and thought process, instead of being told what to do – one example is our “recruitment planning meeting checklist” **(EV20)**. Every recruitment meeting held between managers and the HR team will complete this, the questions are to get managers thinking rather than being told what to do, showing the coaching approach.

These meetings have highlighted many aging departments and encourage managers to be thinking ahead about apprenticeships and mentoring teams to develop succession planning process. Coaching of instilling the bigger picture thought process’, across all levels of management has defiantly seen a positive change. This has helped bring focus and encourage managers to be mindful of the fact that Tai Tarian does not have a consistent or objective way of evaluating performance and potential, encouraging an objective way to plan and structure for succession.

When considering barriers to this implementation I have recognised that Tai Tarian can have a “we have always done it this way” view when change is introduced (Kotter,2016).

Educating colleagues to change their mindset can be a slow process but can be accelerated by trust amongst team members and line managers (if they are on board) Katzenbach et al (2012). *“Somewhere in the waves of change, you will have to attack the sturdy silos and difficult politics, or you won’t create a twenty-first century organisation”* (Kotter,2020).

Organisational agility will affect the receptiveness of making the change to a coaching culture. The “new normal” of the pandemic has seen the organisation become more “agile” and adaptable to change, and the more agile an organisation, the more responsive it will be to change (Cannon,2017), so I am hoping this will encourage the managers to take on board the training. Along with the fact that the HR team has seen, with perseverance, change can slowly be made within the organisation. The HR team will need to work closely with the Senior management team to encourage their participation and promote from the top down. Work by Purcell (2010) demonstrates the need that managers and senior leaders have a high part to play in promoting a specific culture within an organisation. Without those truly onboard, and pushing from top-down, with role modelling behaviour, the agenda will fail (Kotter,2020).

“The top barrier to implementing new practices is the operational pressure that absorbs time necessary to develop and trial different ways of working” (CIPD, 2014) ensuring this has been considered and time set aside for employees to learn and process is needed – without this, employees may feel pressure and frustrations and not engage fully, or line managers may also feel frustrated having to coach a person to realise their skills rather than just telling a person what to do, which is often less time consuming (Francis,2019).

It has been identified that playing the role of line manager, coach and mentor may cause some potential conflict. For example, an employee may find it difficult to or hold back whilst discussing what they see as a gap in their knowledge and learning needs, in fear of some sort of potential discipline or lack of salary increase (if applicable), thus providing an issue as the learning needs will not be correctly identified and fulfilled (Barber,2018). Both coaching and mentoring need a level of trust and accountability within the roles and relationships they have, mentoring even more so as generally over the longer term (Francis,2019). Relationships with line managers and their team members would therefore ultimately then determine the success of line manager coaching and mentoring. I considered the results of the previous engagement survey to look at this, 4% of participants state they never have 1-2-1’s (**EV11**), 18% never feel comfortable being open and honest with their manager (**EV12**) and 8% never receive constructive feedback from their manager (**EV13**), 11% describe their relationship with their manager as very poor or poor (**EV14**). These statistics may link with why 13% of participants state the performance management system (MADD goals process) is poor or very poor (**EV10**).

Managers could overcome these issues by ensuring all staff have personal development plans, with planned and kept meeting times to discuss on a regular basis. These should have clear expectations noted that focus on short-, mid- and longer-term goals - Including delegated new tasks which will continue to expand knowledge and experience and focus on

strength and opportunities rather than weakness and problems (Barber,2018). With this in mind , and Tai Tarian's highlighted use (or lack of) , of the current performance system, there may be a need for a re-launch of using this as well as the 5:3:5 training as a whole package going forward (if the support of all the Senior management team can be gained).

Lack of promoting a change from the top down within Tai Tarian most defiantly has an impact on uptake of change implementation. For example, Feedback from the Senior Management team has been differential in relation to the Performance Management system that was implemented around the time of the 5:3:5 initial training. Certain managers have continued to use certain aspects, others have told their teams to stop using it as it does not add value and considered a waste of resource and time.

With encouragement some line managers have started using the system effectively but unfortunately there has been a particular rise in line managers using the tools to manage poor performance, therefore it is seen as a negative tool and used as a destructive mechanism which, Taylor and Wilkinson (2016) highlight as a criticism of a PM system if not used appropriately.

What we do not want it a repeat of this scenario, working with the senior management team to truly highlight the importance of the coaching culture going forward ultimately will remain the key to its success's and ensure that the coaching sessions are not used as a punitive tool , like the performance management system has become.

The training package has been developed in house, so the main cost is time and effort from staff to deliver and take on board the learning, so could be said that it does not have much financial cost to implement. Although, if this is delivered to all managers and the offer of the external coach providing the two, one-to-one sessions with manager made mandatory, financial viability will need to be considered. Another stance that could be taken is that senior managers and/or manager that specifically request the use of the 2 sessions could then become ambassadors of this change, creating a "mentor pool" (Barber,2018) and go on to then train the other managers when they feel they are able. This can broaden the skill sets of both parties, especially if they are paired from different parts/departments of the organisation, as they have different views of how things work or may not work well from that departments perspectivists. This could increase collaboration across departments which may have been in a silo from each other previously (CIPD,2020).

Although, the success of Coaching and mentoring will be dependent on both the coach or mentor and their expertise in the skills of questioning, listening, clarifying, and reframing (CIPD,2020).

I have personally had some feedback from my line manager that I sometimes do too much for my managers, which they become reliant on , in turn they then do not see the point in learning and I in turn end up overloaded with work. This is something I am trying hard to minimise , but I have felt that sometimes If have not initially completed a task myself, how can I then expect to advise and coach my line managers on doing so. I feel as I have grown more confident in dealing with different scenarios, I have been able to take this step back

approach. Personally, I have been lucky enough to work under an HR Business Partner that has automatically taken on the role of mentor and support me in my own learning and during my study of the CIPD Level 5 (**EV21** Provides a statement from my line manager of my use of coaching, **EV22 & EV23** are example of coaching emails sent to managers on different topics).

Going forward, with more knowledge of the detail of how important coaching and mentoring skills are I would like to enlist in specific training to develop these skills further. Also, with the pending implementation of the additional manager training and relaunch of the previous manager 5:3:5 training, I have asked to be a key part in delivering this training and all further developments to its contents. After discussions with my line manager, I also mentioned not being aware of the external coaching services that Tai Tarian can provide, my line manager also noted that they were also unaware, on this note we decided that going forward it would be appropriate to focus on building and developing the HR teams relationship with the Learning and development team to build bridges between departments and encourage knowledge sharing so that all are aware in future of support we can offer our managers.

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Evidence

EV1

From: Sarah Cosker <Sarah.Cosker@taitarian.co.uk>

Sent: 04 March 2021 16:31

To: Email_training <training@taitarian.co.uk>

Subject: looking for some information

Hi all ...

Just after some information in relation to below (its for my uni course) ... so I saw below on the L&D system - skill box . does this mean that we have a system where I could ask for a mentor / coach from someone in the organisation and you could set that up ? or is it something you are looking to do ? – I was not aware we had anything like this available in the organisation ?

Enrolment options



Coaching & Mentoring - Seminar

This course provides you with an introduction to coaching and mentoring.

Following an introductory seminar, this will be provided with 2 coaching and mentoring sessions with your chosen coach.

You can not enrol yourself in this course.

Continue

[Reset user tour on this page](#)

Many thanks,
Sarah

Sarah Cosker

HR Advisor

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From: Email_training <training@taitarian.co.uk>

Sent: 05 March 2021 08:21

To: Kelly Mordecai <Kelly.Mordecai@taitarian.co.uk>; Kayleigh Wilcox <Kayleigh.Wilcox@taitarian.co.uk>

Subject: FW: looking for some information

Please see question from Sarah

From: Kelly Mordecai <Kelly.Mordecai@taitarian.co.uk>

Sent: 05 March 2021 08:27

To: Sarah Cosker <Sarah.Cosker@taitarian.co.uk>

Cc: Email_training <training@taitarian.co.uk>; Kayleigh Wilcox <Kayleigh.Wilcox@taitarian.co.uk>

Subject: RE: looking for some information

Hi Sarah

This is a Coaching and Mentoring Seminar, which is training that we offer our leaders as part of their personal development and the 5:3:5 Leadership Framework (it has been on hold the past 2 years, but we will be relaunching this)

Best we chat through this - do you want to pop in a catch up and I will go through what we have offered in the past and what our plans are.

Thanks

K



EV2

I asked 3 managers from different departments within the organisation some specific questions:

Summary of conversation with manager 1:

Manager 1 is a team leader of 8 staff, within the trades department at Tai Tarian since Feb 2020, previously employed as an Electrician with Tai Tarian since Aug 2018. Prior to this they had some experience as a supervisor and acting up manager position in a previous role.

Have you ever had any specific training on Coaching and mentoring within Tai Tarian?

No – I have only been a manager in Tai Tarian for around 12 months and had no manager specific training since , not sure if this is because of going straight into lockdown and working from home as soon as I got the job.

Is there any coaching and mentoring training available now within Tai Tarian ?

Not that I know of.

Would you like training on Coaching and mentoring you team ?

Yes, defiantly.

Do you think coaching and mentoring is used in the organisation?

I'm not sure about other departments but I have learnt how Tai Tarian do things from my manager all this time and from asking HR for help and guidance – without this I wouldn't know where to start with management things such as the process for absence management in Tai Tarian.

Do you use coaching and mentoring with your team ?

I try to – but I have no formal training in either ... but I have an apprentice who I believe I mentor by making sure he knows the technical skills for the role that I have learnt.

Do you think coaching and mentoring is important for you team ?

Yes, I think experience and knowledge sharing can help all members of the team.

EV3

Summary of conversation with manager 2:

Manager 2 is a team leader of 15 staff, within the Housing department at Tai Tarian since Aug 2016. Prior to this they worked in a manager position at a different housing association.

Have you ever had any specific training on Coaching and mentoring within Tai Tarian?

There was the mention of some coaching sessions after the leadership 5:3:5 training we received but I never went on it, it was not mandatory, and I just didn't have the time with my workload.

Is there any coaching and mentoring training available now within Tai Tarian ?

I don't think so.

Would you like more training on Coaching and mentoring ?

I think all training helps so yes – but the time would need to be implemented in with my daily workload otherwise I would not have the time to attend.

Do you think coaching and mentioning is used in the organisation?

I use it daily in my team, (not sure about elsewhere in the organisation). I am trying my best to both mentor and coach where I can (I went on a course in my previous employment, so I am aware of the benefits). But to be honest, I really struggle with coaching as its quicker to tell someone what to do rather than take more time encouraging them to think for themselves. At the moment, especially with the effects of covid , as a department were just so busy.

Do you use coaching and mentoring with your team ?

Yes – as I just said.

Do you think coaching and mentoring is important for you team ?

Defiantly ,but you need the time to do it.

EV4

Summary of conversation with manager 3:

Manager 3 is Senior operations manager with 20 direct reports, within the trades department at Tai Tarian. In this role since Nov 2017, previously employed as a team leader with Tai Tarian since March 2011. Prior to this they had 10 years' experience as a supervisor in a previous role with a different organisation.

Have you ever had any specific training on Coaching and mentoring within Tai Tarian?

Yes – I had 2 coaching sessions from an external provider about 2 -3 years ago , it was really good , although I do feel it could have been followed up, and therefore more valued added to all managers as a whole.

Is there any coaching and mentoring training available now within Tai Tarian ?

I think that the Head of Organisational development does some leadership specific coaching, nothing else is available though.

Would you like more training on Coaching and mentoring ?

I would , I am also keen for my direct reports to have specific training on these skills to support their teams.

Do you think coaching and mentoring is used in the organisation?

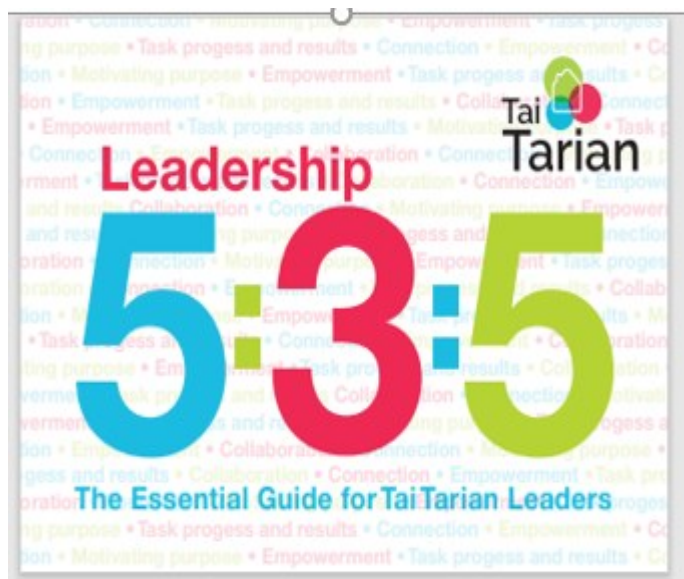
I use it with my direct reports and try to encourage them to use it with their teams, I'm not sure about other departments.

Do you use coaching and mentoring with your team ?

Yes, as much as I can as mentioned.

Do you think coaching and mentoring is important for your team ?

Yes.



What is Leadership?

5:3:5

This is our new toolkit for leading our organisation into the future.

- It's the key way we aim to achieve our goal of empowering our people to make a difference.
- People who manage others need to ensure that they are given good leadership. So we aim to make leading a practical and clear way of doing things, not a theory that's difficult to understand.
- We believe there are five practical things that managers need to "Do" to be leaders.
- We also see that managers operate in three different situations, so they need to understand the three types of skill.
- Finally we have five important values to promote in our organisation.
- From now, this is what leaders need to focus on and be good at. All our leadership development will be clearly linked to the "5:3:5" concept.

Welcome to **Leadership 5:3:5** the future of leadership at Tai Tarian.

This is: Leadership

5:3:5

5 DO'S

- Motivating Purpose
- Progress and Results
- Collaboration
- Connection
- Empowerment

What a leader must pay attention to

3 SKILLS

Public

Private

Personal

Spheres where a leader operates

5 VALUES

Commitment

Honesty

Professionalism

Respect

Teamwork

Values a leader promotes

The Five “Do” Steps Of New Leadership



Motivating Purpose

- You set a clear purpose and direction for your team.
- You link this with the aims of the organisation.
- You inspire people to engage with this purpose and work towards it willingly.

Progress and Results

- You pay attention to progress and drive for results.
- You create clear goals and a productive atmosphere for your team.
- You get the team to focus on outcomes and you get involved to accelerate progress.

Collaboration

- You ensure strong collaboration amongst the immediate team and build those skills.
- You create clear links between your team and others to drive efficiency across the organisation.
- You identify the right external partners to collaborate with and establish robust agreements.

Connection

- You invest time to connect with your team members individually.
- You pay attention to all colleagues and demonstrate respect.
- You take time to be visible, listen to others and gather a wide range of perspectives.

Empowerment

- You build a team of people who can do more.
- You redesign roles that give your team more interesting work and freedom to operate.
- You spend more of your time on coaching, connecting and communicating.

Summary: Old leadership is where managers spend their time on task completion, and leading people is something to try to find time to do.

New leadership is about investing time in the five activities shown to build team, individual and organisational performance.

The Three Skill Areas Of New Leadership



Public

- Being visible in the wider organisation and being authentic.
- Being a positive presence, setting the “tone”.
- Driving collaboration to accelerate progress.
- Presenting and speaking to groups.

Collaboration

- Giving constant skilful feedback.
- Managing performance honestly.
- Understanding and developing your people.
- Building an effective team.

Connection

- Growing your self-awareness to lead by using your strengths.
- Showing you’re open to feedback and growth.
- Building professional credibility.
- Investing in connection with others.

Summary: It can help if a leader is a confident public presence, but it is a small part of the role. Leaders need to ensure that they become self aware, to appreciate their strengths and build on them.

They need to practice being capable at private leadership. They need to learn about the elements of leadership that they don’t enjoy, and develop ways of collaborating to overcome that obstacle.



'Our Behaviours'



Making a Difference

Teamwork Honesty Professionalism Respect Commitment

What is the Tai Tarian Behaviour Framework?

At Tai Tarian, we recognise that our most important asset is you, our employee.

At our annual staff conference in 2012, the organisation's 'values' were set by employees. Those who attended told us that the values summarised how they wanted to be seen by others.

Our Values:



In short, this behaviour framework details how you can put the organisation's values into practice and ***make the difference!***

This framework includes those behaviours which all members of staff, regardless of their role and grade in the organisation, are expected to demonstrate in their everyday work. These are referred to as 'expected' behaviours.

The framework also includes those behaviours required by employees looking to develop and those who are in supervisory positions. These are referred to as 'leadership' behaviours.

What do we mean by behaviour?

Behaviours demonstrate the attitudes and approach we take to work and they are:

- How we do things;
- How we treat others;
- What we say and how we say it;
- How we expect to be treated.

Making a Difference

Teamwork Honesty Professionalism Respect Commitment

Commitment

Working with enthusiasm and dedication to deliver high quality services.

Expected

Our required behaviours

- I see things through to completion;
- I have a positive approach to my work;
- I use all of my skills and knowledge to achieve my objectives;
- I deliver on time and as promised;
- I am flexible and work with minimal supervision after relevant training;
- I behave in line with the values of Tai Tarian;
- I look for better ways to do things and share my ideas.

Leadership

These behaviours are required by employees looking to develop and those in supervisory positions

- I work to build engagement and improve my team's behaviour;
- I act as a role model for loyalty, dedication and reliability;
- I am commercially aware and ensure value for money;
- I share vision, meaning and direction;
- I initiate and lead others through change;
- I encourage others to do the best they can;
- I make decisions based on evidence and not assumptions.

When Commitment is *not* demonstrated

- You are disinterested and have a negative approach to work;
- You are disorganised and miss deadlines;
- You are frequently late or absent from work;
- You only do the bare minimum;
- You are disrespectful to customers and colleagues and react defensively to constructive criticism;
- You are unwilling to consider change;
- You don't have pride in your work and never see things through to completion.

Making a Difference

Teamwork Honesty Professionalism Respect Commitment

Honesty

Being truthful, clear and transparent.

Expected

Our required behaviours

- I tell the truth (whilst respecting confidentiality);
- I am careful not to raise expectations and am realistic about what can and can't be achieved;
- When I make a mistake I say sorry and don't try to hide it;
- I don't abuse my position or the company's resources for personal gain;
- I address inappropriate behaviour and do something about it;
- I always act within our policies, rules and regulations.

Leadership

These behaviours are required by employees looking to develop and those in supervisory positions

- I have difficult conversations and deal with situations in an open and honest way;
- I raise concerns and work to find acceptable solutions;
- I make difficult decisions and openly acknowledge errors;
- I recognise my strengths and weaknesses and always try to improve;
- I enable a blameless culture, empowering and supporting my team.

When Honesty is not demonstrated

- You use situations for your own personal gain;
- You can't be relied on;
- You deliberately set out to de-fraud;
- You pretend to be busy so you don't get asked to do things;
- You make promises that you know can't be delivered.

Making a Difference

Teamwork Honesty Professionalism Respect Commitment

Professionalism

Making a positive impression through skills, behaviours and appearance.

Expected

Our required behaviours

- I am punctual, friendly and have a positive approach to work;
- I take pride in my work and that of my team;
- I treat everyone I meet with respect;
- I always behave ethically;
- I admit and learn from mistakes;
- I am keen to learn and share with others;
- I do my job well.

Leadership

These behaviours are required by employees looking to develop and those in supervisory positions

- I promote continuous improvement in the workplace;
- I lead by example, influencing positive behaviour in everyone;
- I ensure that my team and I remain focused on objectives;
- I always look for creative solutions to problems;
- I seek opportunities for feedback on my performance;
- I use my expertise to develop and coach my colleagues.

When Professionalism is *not* demonstrated

- You continually miss deadlines;
- You dress or behave inappropriately;
- You display a negative attitude towards colleagues and customers;
- You blame others when things go wrong.

Making a Difference

Teamwork Honesty Professionalism Respect Commitment

Respect Treating others as you expect to be treated yourself.	
Expected <i>Our required behaviours</i> • I say thank you and acknowledge when a good job is done; • I say sorry if I have let someone down; • When someone speaks to me in confidence, I keep it to myself; • I treat peoples' properties and possessions as I would my own; • I treat everybody equally; • I work within the policies, procedures and rules of the company.	Leadership <i>These behaviours are required by employees looking to develop and those in supervisory positions</i> • I empower others to make decisions; • I give others autonomy to make mistakes and learn from them; • I value the input of others; • I am a role model for an inclusive leadership style; • I adapt my approach to people to ensure good working relationships; • I encourage and value diversity.
When Respect is <i>not</i> demonstrated • You talk inappropriately about and to customers and colleagues; • You approach work with a negative attitude; • You disregard people's property or possessions; • You make little or no effort to understand things from others' points of view.	

Making a Difference

Teamwork Honesty Professionalism Respect Commitment

Teamwork

Working together by sharing information and supporting each other to achieve our goals.

Expected

Our required behaviours

- I listen to others' opinions and ideas and consider these in my work;
- I act sensitively to the feelings and needs of others;
- I take responsibility and deliver on my role within the team;
- I share relevant information with others where needed;
- I support colleagues when they are under pressure;
- I am flexible in my attitude and approach to my work.

Leadership

These behaviours are required by employees looking to develop and those in supervisory positions

- I consult with others outside of my team who may be affected by my decisions;
- I welcome challenge and use it to improve services for customers;
- I encourage and support others to learn and develop to continually improve in their role;
- I motivate others by inspiring enthusiasm and willingness to get involved;
- I lead by example.

When Teamwork is *not* demonstrated

- You don't allow others to get involved or voice their opinions;
- You don't listen to others;
- You are insensitive to the feelings of others;
- You sit back and let others do all the work;
- You keep things to yourself and work to your own agenda;
- You don't recognise when others need help.

Making a Difference

Teamwork Honesty Professionalism Respect Commitment



Learning and Development Policy

Document Control			
Policy Number:	06	Date Approved	25 th June 2020
Version Number:	03		
Applicable To:	All staff including Executive Team. Also Consultants, Agency Staff and Volunteers	Next Review Date:	3 year
Responsible Officers:	Wayne Gwilym Head of Organisation Development		

1. Introduction

The purpose of this Policy is to ensure that Tai Tarian provides a working environment that fosters a culture of continuous learning in which both formal and informal learning experiences are recognised and the organisation's performance is clearly linked with its people's individual performance.

2. Principles

The aim of the Policy is to provide a framework to create a 'Learning Organisation' in which people can respond to and meet the changing demands and priorities of the Organisation and its service users. This will be achieved through proactively providing opportunities for formal and informal learning and by supporting people to reflect upon and learn from their day to day experiences.

3. Links with other Documents/Processes

The following procedures will be governed under the framework of this Policy:

- Learning and Development Procedure
- Support for Qualification Based Study Procedure

The following procedures and standard guidelines will be linked to this Policy framework:

- Induction
- Making a Difference Dialogue
- Leadership 5:3:5

4. Links with other Services

- Health and Safety

5. Welsh Language Implications

This Policy complies with Tai Tarian's Welsh Language Scheme.

6. Equality Implications

Tai Tarian is committed to the equality of opportunity in employment and discriminatory behaviour will not be tolerated at the workplace. Tai Tarian is committed to giving an equal service to all. Any action taken under this Policy will comply with current equalities legislation.

Tai Tarian staff will operate within the Equality and Diversity Policy and will seek to address any specific needs in respect of protected characteristics. Tai Tarian will in all reasonable circumstances make information available in a variety of information formats, including: large print; audio tape; and community languages.

7. Policy Monitoring

This Policy will be monitored on a regular basis to ensure it remains fit for purpose and reflects the practices of Tai Tarian and any changes in legislation.

8. Accessibility

A copy of this Policy will be made readily available by Intranet or from the Organisation Development department on request.



Learning & Development Procedure

Procedure Title		Reference	Version
Learning & Development Procedure		LD-001	3
Responsible Department:	Learning & Development, Organisation Development		
Responsible Persons:	Head of Organisation Development		
Issue /Reviewed Date:	May 2019	Review Date:	May 2020

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Section One – Principles

What is it for?

To provide an overview of the Tai Tarian approach to Learning & Development so that managers and employees fully understand their responsibilities in relation to their own learning and development and that of their team members.

Who is it for?

All employees, agency staff, consultants, work placements, volunteers, tenants and board members who work on behalf of or represent Tai Tarian.

Key Responsibilities

These are the headline responsibilities of all stakeholders. A fuller description is provided in the RACI matrix in Appendix 1.

Line Managers	Line managers are accountable for planning the training for their team members, proactively integrating new and transferred employees into their team and supporting the development of established team members. This involves regularly reviewing the training matrices to ensure each team member is compliant, ensuring team members attend training as planned, and collaborating actively with the Learning & Development team at an early stage to plan department training activity.
Learning & Development Team.	This team is accountable for ensuring that the specified training is available, planned, programmed and suitable for each employee. Also accountable for collaborating with line managers and all stakeholders to implement organisation-wide initiatives. To ensure effective and efficient record keeping and reporting.
Participating Employees	Are accountable for completing the assigned training, attending events as planned, completing attendance sheets and providing other evidence of attendance to ensure records are accurate. Employees are expected, when requested, to verify the accuracy of their training record.
Subject Matter Experts / Health & Safety Manager	Are accountable for ensuring the specified mandatory training in their specialism is continuously reviewed for relevance. To review subject course content and delivery method for role types. To collaborate with the L&D team to ensure that compliance levels are maintained.

What are the guidelines?

Mandatory & Role Specific Training

- Each role within the organisation will have mandatory training elements which employees must complete in the first three months of their "Action Plan" probation period.
- Mandatory training applies to all employees, agency staff, consultants, work placements, volunteers, tenants and board members;
- Each element of mandatory training will have a nominated subject matter expert in the organisation who will take responsibility for the ongoing accuracy of their content and for collaborating with Learning & Development to ensure compliance training is delivered on schedule. A list of subject matter experts will be found on the Learning & Development section of the intranet.
- The majority of the mandatory training is available 24/7 through our e-learning portal;
- Additional role specific training will be relevant for particular roles, this will be agreed and determined by the line manager;

The Managers Role in Training

- Communicate Mandatory and role specific training requirements to the employee during "Action Plan for Success" / one to one meetings or MADD reviews and agree a time plan to complete the training (not exceeding three months for mandatory training).
- Evaluate if different mandatory training is needed for a team member who has transferred into the team. **For example** the new role may require that a subject needs to be covered in more depth through a face to face training programme even where the employee may have completed a mandatory element on e-learning. Discuss with the Learning & Development team if advice is needed.
- Restrict the duties of an employee for elements where mandatory training is outstanding or provide appropriate supervision to ensure any risks are controlled until training is complete.
- Collaborate actively with the Learning & Development team to complete and maintain compliance.
- Have an ongoing dialogue with employees about their training needs in connection with their role and their personal development to ensure that any skill gaps are identified and that there is a mutual understanding, both of the reasons for the training and what is expected to change or improve as a result;
- A learning need request for anything in addition to the mandatory training should be added into the individual's current "Making a Difference Dialogue" form and authorised by the line manager. This will automatically be sent to the L&D inbox for action.
- Complete a three month follow up evaluation of any completed training to assess whether the training need has been met.

Planning & Evaluation

- Training requests for Tai Tarian core training not available through the e-learning portal can be made directly to the Learning & Development team by e-mailing training@taiarian.co.uk, telephoning the OD / L&D Team or in person in the OD Office in the ground floor of Ty Gwyn.
- Planned training events can also be viewed in the learning & development programme (available on the intranet or by requesting a copy from your line manager) or by opening the Email_training calendar from your Outlook calendar for employees with access to IT.
- Training activities will be followed by an initial evaluation completed by the participant. The evaluation may be an evaluation sheet at the end of a course or a short evaluation survey to complete online.

What else do you need to know?

- Tai Tarian is committed to becoming a 'Learning Organisation' in which its people are supported to reflectively learn and adapt through their experiences, as well as attending the more traditional training courses, conferences and seminars.
- Proposals to sponsor an employee to study for qualifications must be discussed with Learning & Development before proceeding. The relevant Director / Head of Service must also approve. The procedure for this is covered within Support for Qualification Based Study procedure and employee understands any financial penalties should they leave after initial investment/completion of training.
- All learning & development requests will be considered, however, not all requests will necessarily be granted.
- In addition to training planned between the manager and the employee, some training and development activity is initiated at organisational level as part of our ongoing drive to improve our skills.
- The budget for learning and development activity of employees, agency staff, consultants, work placements, volunteers and tenants will be held centrally by the Learning & Development team. The budget for Board member's learning and development will be held by the Corporate Services team.
- Training records are held and updated centrally by the Learning and Development team. Managers must inform Learning & Development of all events that employees are planned to attend to ensure training records are accurate.
- Employees should provide copies of certificates and/or confirmation of attendance so that it can be added to their record.
- Line managers are provided with training matrices for use as a tool to track and monitor their team's mandatory learning and development activity. These will be held on SharePoint and are updated weekly.
- Employees are expected to attend agreed training events unless there are exceptional circumstances which prevent them attending. If the employee cannot attend their manager should let the Learning & Development team know as soon as possible along with the reasons why.
- The L&D Team will produce monthly reports on all training activity, compliance and non-attendance to ensure the training function can operate effectively as possible.

Section Two - The Learning Cycle at Tai Tarian



Training Needs Analysis

Training needs analysis takes place on 3 levels:

Organisational

- These training needs can be driven by forces external to the organisation such as changes in legislation and statutory requirements. They can also be driven by the organisation's strategy (Our Corporate Plan)

Team/Departmental

- These training needs can be driven by department specific plans and changes such as new projects, operational business plans and team re-structures..

Individual

- These training needs will be specific to the individual and will be driven by the goal setting process during the Making a Difference Dialogue. Individual needs can also be identified by the individual and/or their manager to enhance personal effectiveness as well as for personal development for career progression.

There are a number of ways in which the training needs can be identified in all three levels, these include:

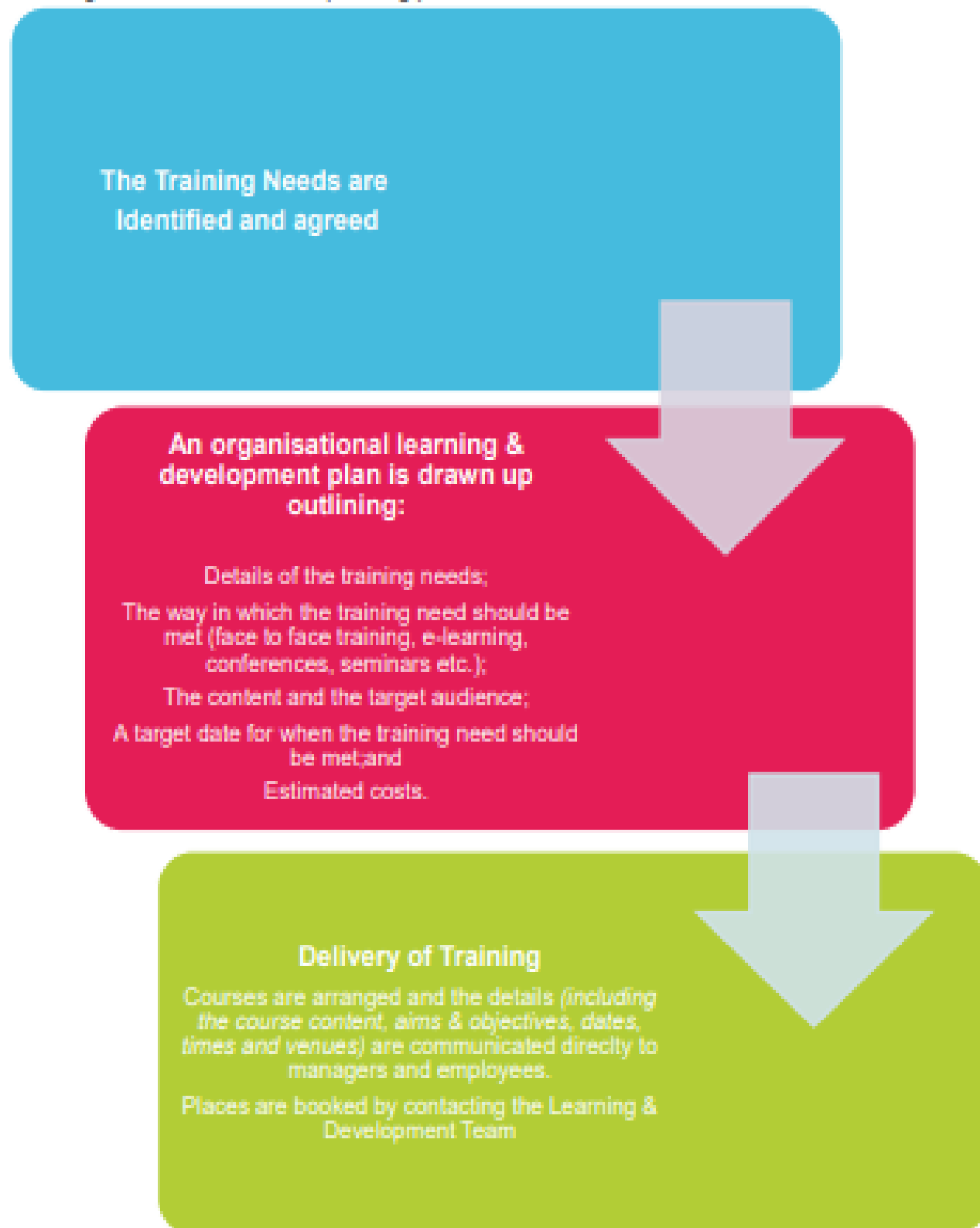
- During meetings between the Learning & Development team and Senior Management Team/Heads of Service/Managers
- During Discussions between the manager and the team
- During discussions between the manager and the individual

All requests for learning and development should be submitted on the Learning Needs form via the Making a Difference Dialogue.

Planning, Design & Delivery of Learning & Development Activity

The Learning & Development team use the information gathered from the training needs analysis process along with performance results and succession discussions to plan the development activity throughout the year and inform the training budget requirements.

The diagram below outlines the planning process:



At this stage, the approach to meeting the training need has to be decided. The training activity design can be carried out by the manager and/or the learning and development team. There are a number of methods of delivering learning including:

Method of learning	Method of delivery
A face to face training event	In house training course External training course
Conference	External event
Seminar	External event In house CPD event
Formal qualification	Day release Distance learning
Self-directed learning	Research Reading Webinars Job Shadowing
e-learning	In house e-learning External e-learning
Coaching	In house coaching External coaching
Mentoring	In house mentoring External mentoring
Shadowing Secondments	On the job training Informal learning off "Go To Experts" Internal/external Formal or Informal
Team Briefings	Internal Skype / Virtual Meetings

Other things to take into consideration when designing the training activity include:

- Does the achievement of this training need link to the strategic objectives/operational business plan/individual goals?
- Is there an existing event available that meets the training need?
- How much will the training activity cost?
- Are there available funds in the budget?
- Are additional resources required (i.e. text books, equipment)?
- When does this need to be completed by?
- Are there any other areas of the organisation that could be included in delivery of this training?
- Are there any other similar organisations providing the training?
- Has the manager agreed and authorised the request for training?
- Had the Learning and Development team agreed and authorised the learning?
- Does the learner have any specific requirements or require adaptations? e.g. dyslexia

Delivery of the Training Activity

Many training events are held externally and attended off-site.

For in house training events, Tai Tarian has its own off-site Training Centre where the majority of in house training courses are held.

However, if it is decided between the Learning & Development team and the manager that it is more convenient to hold the event at Ty Gwyn, this can be arranged depending on availability of the rooms.

The majority of the mandatory and compliance training is delivered initially face to face for front line staff and then refresher training delivered through e-learning via the learning management system or Tool Box Talks.

Evaluation of the Training Activity

To ensure we continue to deliver and procure effective learning & development, training evaluation is carried out on three levels:

Level	Evaluation	Method
Level 1:	Initial needs analysis	The manager/employee identifies training need The manager/employee enters the need into the MADD Learning Need form, this is used as a benchmark to measure the behaviour/knowledge change after the training activity.
Level 2:	Initial reaction & Action Plan	The employee completes and initial feedback form (appendix 1) after the training, or an electronic version (Training Check Survey) which measures the quality of the trainer and course content.
Level 3:	Manager follow up after 3 months and beyond	The manager should revisit the learning need request in the MADD form with their employee to complete:- “Did you learn what you hoped to learn” box. and “Have you been able to apply the learning” box. If answer to either of these questions is “No”, they should discuss what actions to take going forward, that could potentially mean seeking a new learning activity. Please share the feedback with a member of the L&D team to action.

Recording & Monitoring

Recording and monitoring training helps to ensure employees are fully competent to carry out their duties safely and to the highest possible standard. This is in the interest of both employees and the organisation.

Tai Tarian records training activity in the following ways:

QL – Learning and development management information system

We hold training records for each employee on our I.T. system. This provides an accurate, up to date overview of training related information including:

- Title or subject of the training event or activity the employee was booked to attend
- Whether they attended as planned, or the reasons for non-attendance
- Whether the training event has been completed successfully.

This information is used to populate the corporate training matrix and any job specific training reviews.

Attendance lists

For in house and some external training events, attendees are required to sign an attendance list. This acts as an additional record of their attendance on the training event. On the attendance list, the trainees sign to say they have understood the training delivered.

Certificates

For training events that result in the employee gaining a certificate, these are scanned and saved onto the employee's personal file before being handed to the employee. In the cases where the certificate goes direct to the employee, they will be required to pass a copy onto Learning & Development so that it can be added to their files.

E-Learning LMS

Our Learning Management System captures and records all e-learning activity and this data is extracted and included in the monthly activity reports.

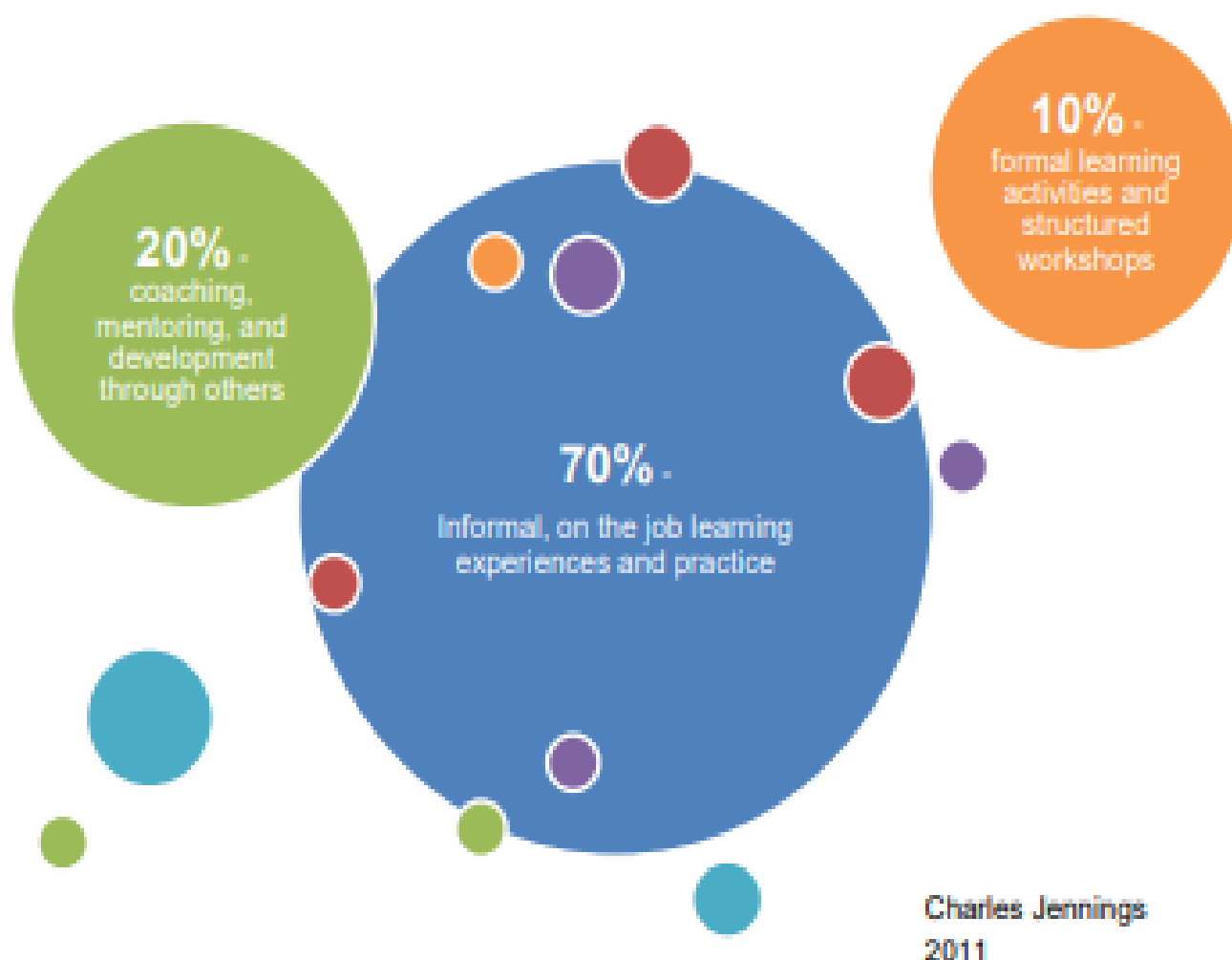
Training matrices

Training matrices are displayed on the intranet to provide a monitoring and planning tool for managers and to indicate our organisational compliance with mandatory training. They provide managers with an overview of the training their team members have received. They also provide a tool for them to analyse and plan their training needs, identify the gaps and address them. Managers also use data included in the monthly learning and development activity reports to plan their training needs.

Budget

A budget is held centrally for all Learning & Development activity. This is monitored by the Learning & Development team to control spending and to provide insights into key measures such as spend per employee and department, spend per category etc. It is essential that all managers consult the learning team prior to committing to any spending.

70:20:10 Model of Learning & Reflective Learning Practice

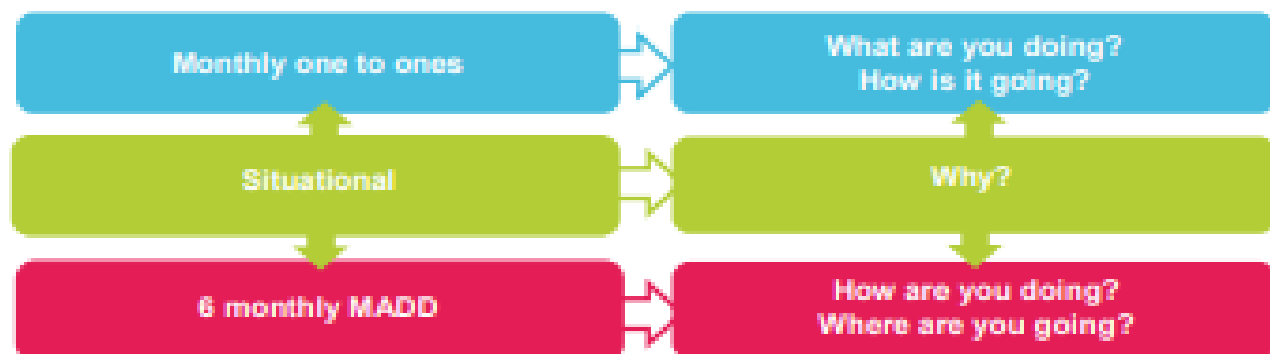


As described in the 70:20:10 model of learning above, the majority of learning takes place informally through on the job experiences.

In order to capture and record this informal learning, a **Reflective Learning Journal** is available on the L&D intranet page for use by all employees.

In addition any learning can be captured on the MADD forms either on the 1:2:1 section or as part of Personal Development Goals, through dialogue and reflecting on new experiences and / or challenges that has been overcome.

By recording informal learning, the employee will be able to reflect upon their learning experience which in turn will support the transition to improved knowledge, skills and attitudes.



5 Do's: One to One Guidance

Do this:

"Check in" with each of your people, minimum once a week.

Hold one to one conversations monthly to focus on progress and results. Build these into your Making a Difference Dialogue process. Use the "Core Questions" to drive brief, action focussed conversations.

During the conversation make sure you give feedback so you're both clear.

Where you feel there are blockages or barriers, use the relevant questions from the themes given below to stimulate the right conversation style and get commitment to move forward.

Make brief notes of action points; a good tool is the "notes" app on iPad. You can also upload a document to the employees "MADD" form if that works for you.

Core Questions:

Style: Review/Clarify

50%
You

50%
Them

"What are you focused on at the moment?"

"What is going well?"

"Is there anything getting in your way that I can help you with?"

"What do you want to accomplish next month?"

"Overall, how are you feeling?"

Always give feedback.

- If it's going well, say so. Give praise.
- If you're disappointed, be honest.
- Stay supportive, use real observations.
- Focus on what you both need to do to make things happen.

Situational Questions

The following 'pick n mix' question banks can be used to help you frame your conversations where you need to go deeper.

When talking about personal development...

Conversation style:
Review

50%
You

50%
Them

"How did you grow during the last six months or the last year?"

"What have you learned or improved on?"

"How are you going to learn and grow, looking ahead?"

"Which strengths can you develop in your current role?"

When establishing/re-aligning expectations

Conversation style:
Clarify

50%
You

50%
Them

"What do you believe you are paid to do?"

"What do you think is expected of you in this role?"

"What do you expect of me as your team leader/manager?"

"How does what you are doing impact on the customer's experience?"

When you need to build relationships and connect

Conversation style:
Coach

30%
You

70%
Them

"What parts or activities of your current role energise you?"

"When do you feel your job is important?"

"When you achieve your goals, how do you like to be recognised?"

"Do you feel the two of us talk often enough?"

"Is this working for you?"

Questions where you need to improve performance

Conversation style:
Lead / Challenge

50%
You

50%
Them

"You haven't done what we agreed. Why?"

"Let me explain what I expect of you in this role."

"I need you to improve your performance."

"You need to contribute more."

"You're delivering great results, how do we maximise the benefit?"

"What's the best way for you to help me

How to ask for feedback

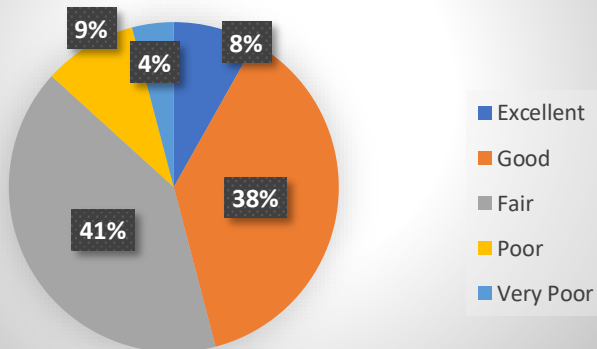
- "Please give me your feedback."
- "What can I do better next time?"
- "Don't be nice, be helpful"
- "Thank you for your feedback"
- Listen without judgement (don't get defensive)

"If you were my manager, what advice would you give me?"

EV10 – EV16

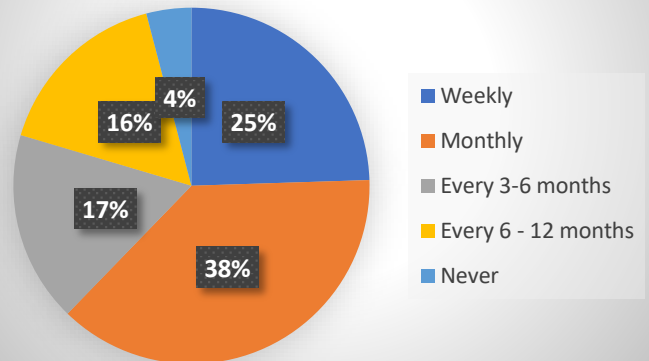
EV10

How would you rate the MADD goals process?



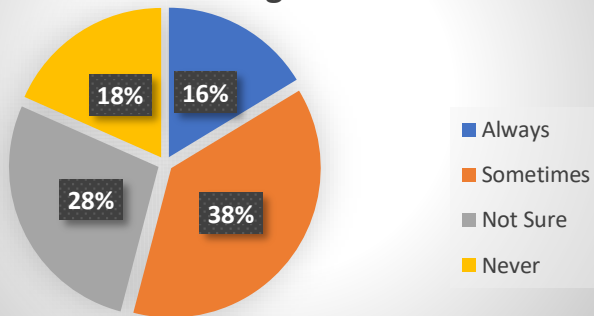
EV11

How often do you have 1-2-1's with your Manager?



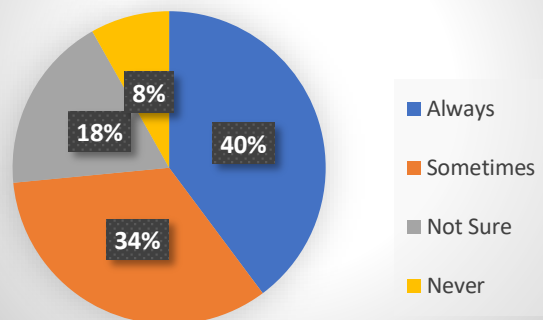
EV12

Do you feel comfortable being open and honest with your Manager?



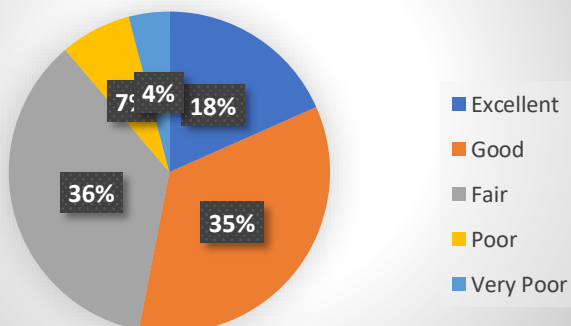
EV13

Do you receive constructive feedback from your Manager?

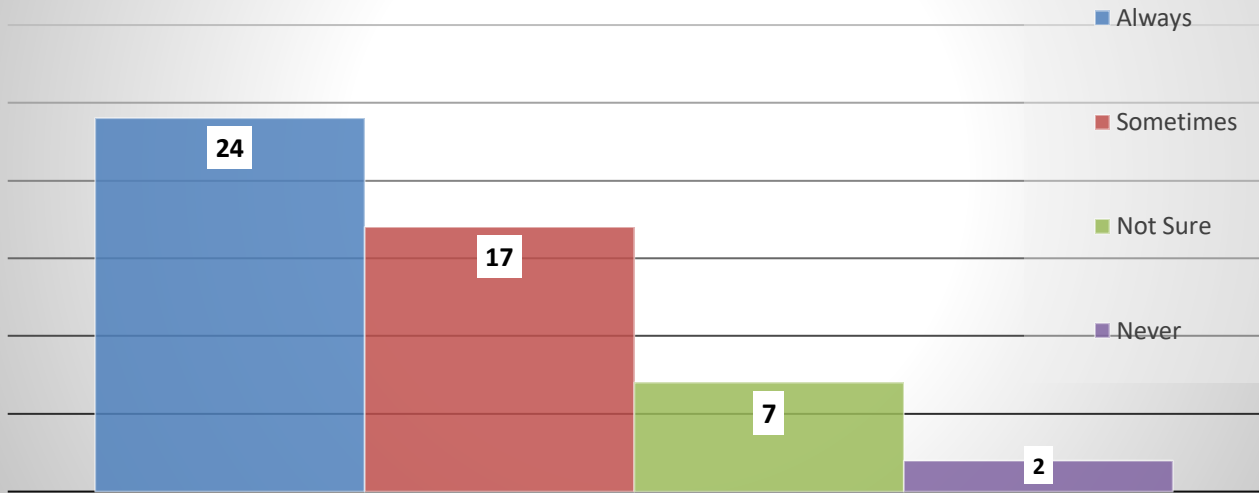


EV14

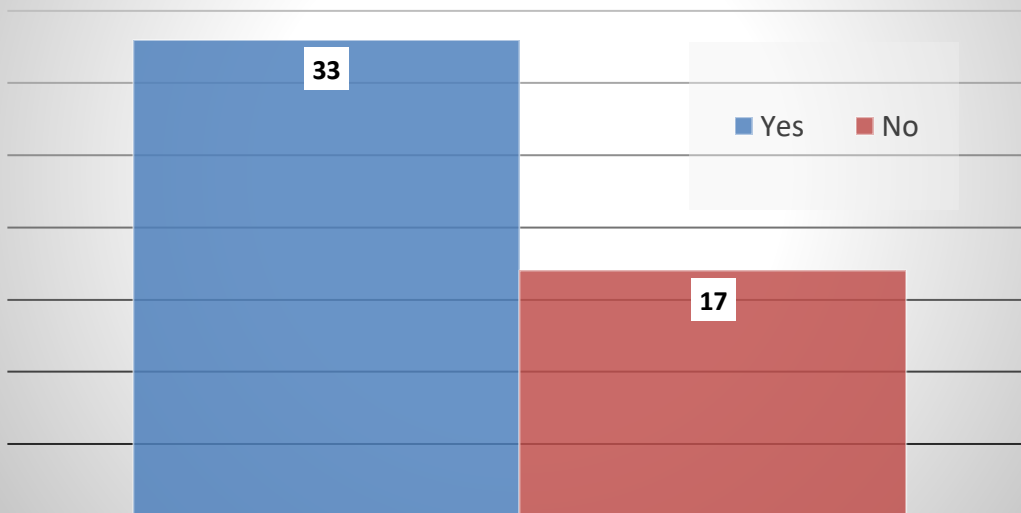
How would you describe your relationship with your Manager?



EV15 - If you are a manager..
Do you feel you have the appropriate tools/training to support your team ?



EV16 - If you are a manager..
Would you like more manager training to support your team ?

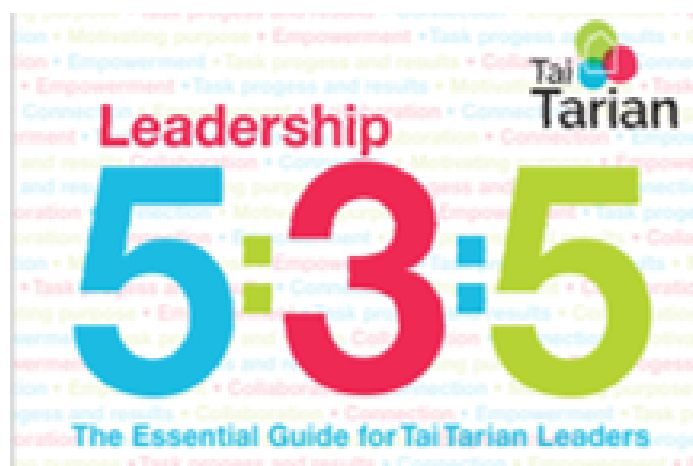


EV17

Written comments/ feedback from Survey

50 managers participated in the survey, 13 left comments in the free text box

<i>If you did not answer “Always” to questions 19 & 20 please provide detail below -</i> Comments:
<i>I struggle to support my team via video call, do you have any guidance you can distribute to managers</i>
<i>I have only been a manager for 6 months and have not received any manager training .. do we have any ??</i>
<i>I had manager training about 3 – 4 years ago but nothing since</i>
<i>I do not want to do formal training like the ILM what else have we got ?</i>
<i>I give a lot of support to a new manager .. they have not had any specific management training from Tai Tarian</i>
<i>Things are different with my team working from home do you have any tips on encouraging my team with this new way of working ?</i>
<i>Do you have training for managers ?</i>
<i>The training I have had from Tai Tarian has been good in the past, but we haven't had any for a while</i>
<i>Please provide more manager training – especially with the way we are doing things now !!</i>
<i>Can you provide specific training on dealing with investigations ?</i>
<i>How can I deal with serious matters via video calls ?</i>
<i>We can we go back to the office I find it easier to talk to my team face to face</i>
<i>Do you have any advice for supporting my teams while we are working from home</i>



Training Programme 2021-2023

1



2

Leadership Levels

5:3:5

Executive Leadership Development (Level 7)

- This programme will be advanced level training for our Executive and Senior Management Team (Heads of Service and above)
- This level will be additional development and learning modules in addition to the Operational Management Tier.

Operational Management (Level 5)

- This level is for all operational managers with line management responsibility or those in a role who has a matrix management responsibility. (Responsible for a project/process that is managed and impacts on the wider organisation).

New and Aspiring Leaders (Level 2/3)

- This level is an introduction to management/leadership for new or aspiring team leaders.
- This level will enable you to gain insight into your leadership skills.

3

Leadership Categories

Here are the categories that you need to pay attention to and be competent at to be an effective **Leader** and **Manager**.

5:3:5



There will be varying levels of skill and knowledge within each category which is determined by your role and leadership level.

4

Personal Leadership

Self awareness is about understanding yourself. In order to effectively lead others, you need to understand who you are, your areas of strength and preference along with areas to build upon. Understanding and valuing difference unleashes an inclusive approach to work and enhances the performance of all. No person is perfect but a team can be. It is only through using and referencing these tools on a regular basis will you develop into an effective leader.

We start this process by using a number of profiling tools that provide you with insight into how you prefer to work, think and behave in varying situations. Many of these tools are also open to all staff.

Our Tool kit-	Method	Who this is for
Emergenetics	Profile, feedback and coaching	All Staff
Clifton Strengths	Profile, feedback and coaching	All Staff
i-resilience	Profile, feedback and coaching	All Staff
Time & workload management	Learning module	All Leaders
Listening and Questioning Skills	E Learning Module	All Leaders
12 O'clock High	Cinema Event	All Leaders
Making it work: You will transfer learning into practice and make it effective by? We will identify natural internal coaches that you can seek support from. You will use your Personal Leadership: Planning, Reflection and evaluating your success and progress in your personal goals and attainments.		

5:3:5

5

Private Leadership

As a leader you are not always in the public domain, however the experiences you have with your colleagues, whether informal or privately say a lot about you and your credibility. This is about having conversations that matter and produce results.

The ability to have skilful, honest and engaging conversations with people in your team or with peers is fundamental to long term success. This can be in support of managing performance, such as goal setting or performance feedback, or to resolve conflict or provide support and encouragement in achieving goals (personal or professional).

Our Tool kit-	Method	
5 conversation styles	Training event & coaching, Guidance	All Leaders
Conflict Management	Training event & coaching	All Leaders
Coaching	Workshop/Private Sessions (x2)	All Leaders
Mentoring	Workshop/Private Sessions (x2)	All Leaders
Reflection	Journaling	All Leaders
Making it work: You need to think about how you plan and prepare for your conversations. . What is the purpose and what outcomes are you seeking? You need to be able to adjust your style using your Personal Leadership traits and skills. Consider the impact of your style on the person you are communicating with. . Remember we are all different and may use things differently to you. We will identify champions per topic at each level so you can seek support.		
You will use your Private leadership skills: MADO reviews, 1:1 reviews, peer conversations, wellbeing discussions.		

5:3:5

6

Public Leadership

Public leadership is about setting the right climate whether in a team or group and for the organisation where you may be representing. In the public sphere we want you to be an exemplar leader, setting standards and expectations and being a role model that is inspiring to others.

It is important that you are authentic and credible making sure that colleagues feel psychologically safe and engaged. Your public presence will impact on the employee experience and the trust and confidence others have in you.

Our Tool kit->	Method	
Effective communication skills	Training event & coaching (2 days event)	All Leaders
Employee Engagement	Training event & coaching (Gallup Q.121 - TBC)	All Leaders
Effective Team Meetings	Workshop and Guidance	All Leaders
How to be Inclusive	TBC	All Leaders
I-act Managing Mental Health & Wellbeing	Internal virtual seminar & I-act community	All Leaders

Making it work:
 You need to think about how you plan and prepare for your public communication.. Again focus on what is the purpose and what outcomes are you seeking?
 You need to be able to adjust your style using your **Personal Leadership** traits and skills to ensure you can connect with your audience/peers.
 Consider the impact of your style in the setting you are communicating in ... remember a group can think, behave and have a very different perspective.
 Seek feedback from members of our audience to support your reflection so you can continuously improve and find your best natural style.

You will use your public leadership skills:
 Meetings (both internal and external), Presentations and Events.

5:3:5

7

Motivating Purpose

Having a **Motivating Purpose** can be the slightest yet most influential element of being an effective leader. This is about framing the work of the team in inspirational ways, linked to the corporate goals, reminding the team publicly of their mission.

Managing complexity to make work clearer and simpler for teams, avoiding waste and unnecessary work. Continually framing, re-framing and prioritising. Motivating your team to succeed requires **Energy** (hope, momentum, share passion), **Direction** (set for better decisions) and **Inclusivity** (everyone plays a part with energy and adds value.)

Our Tool kit->		
Business Planning	Workshop	Operational Leaders
Goal Setting	Workshop & Guidance	All Staff
Motivating Teams	Tip Sheets and Guidance	All Leaders

Making it work:
 Always be mindful of the big picture and what you are trying to achieve ... Ask yourself what does success look like?
 Visualise your outcomes and communicate that to your colleagues ... Goals need mutual understanding and clarity to so you are on the same page.
 Ensure that your team is able to contribute to the setting and achievement of goals ... allowing everyone to contribute so you get the best ideas and outcomes.

You will need a motivating purpose in the following scenarios (to name a few):
 Goal Setting, MADD Reviews, 1:2:1, Team Meetings, Setting Standards of health, safety and performance for your team and service, staff engagement, staff wellbeing.

5:3:5

8

Progress & Results

Managing **Progress and Results** is about making sure that everyone knows exactly how to contribute to the team's and the organisations success. Your team should know what they have to do, by when and how it will be evaluated. They should know what skills they need to develop, what their best contributions are and what they need to look out for.

You do this by setting engaging goals, **driving for results** and **accelerating progress** where needed. This will succeed by creating a productive atmosphere with focus and accountability.

Our Tool kit-

Introduction to MADD	Workshop and Guidance	All Leaders
Project Management	Workshop TBC	All Leaders
Digital Performance	TBC	All Leaders

Making it work:

Tap into your **Leadership Styles** 5 styles of conversation . Use these tools to clarify where you are and where you need to be .. How will you measure this? Remember the purpose and aims and ensure they link to our corporate plan.

Understand the traits of your team to best tap into their strengths to achieve .. advise as appropriate where support is needed.

How are you performing as a service? Your people are key and large part, but how are other areas performing such as budgets, services results and KPI's.

Progress and Results is also about bringing innovation and improvement to what we do so do you need to change processes and protocols to improve.

You will evaluate progress and results in the following scenarios (to name a few):

MADD Reviews, 1:2:1, Team Meetings, reviewing and evaluating standards of health, safety and performance for your team and service, staff engagement, staff wellbeing and all other **People Management** activities.

Reviewing and improving policy, procedure and cultural norms.

5:3:5

9

Collaboration

Collaboration is about making sure that work is done together, starting with a shared perspective. This informs public leadership, so that leaders can convey a unified, coherent programme for the organisation. You heard the saying 2 heads are better than 1, 4 heads are better than 2!

Beyond a clear work programme, make sure that colleagues are included and have the skills to get the best from one another to achieve the best outcomes... first time.

Our Tool kit-

Critical thinking, problem solving & decision making	Workshop (TBC)	All Leaders
6 Thinking Hats	Workshop	All Leaders
Negotiating & Influencing skills		
Leadership Breakfasts	Quarterly Workshops	Operational Leaders
Understanding your stakeholders and other teams.	Workshop (TBC)	All Leaders

Making it work:

Tap into your **Personal Leadership**, know you and know who you need to work with .. and how they like to think and behave and what strengths they bring.

Understand the traits of your team to best tap into their strengths to achieve .. advise as appropriate where support is needed.

Collaboration is also about bringing the best outcomes to a task or project so identify early on who needs to be involved .. involve them from the start.

You will need to collaborate in the following scenarios (to name a few):

Organisation structure and design, Organisational Change and development, Technology improvements, Achieving our Corporate Plan, Developing new initiatives. Reviewing and improving policy, procedure and cultural norms.

5:3:5

10

Connection

You cannot support, collaborate or influence someone with whom you have no **Connection**. You cannot achieve things on your own, and why would you want to, so to gain help from others you need to build a trusting, respectful and credible connection.

Communication and **Connection** is absolutely fundamental for effective leadership. You need to be able to connect with **all** your staff, colleagues and stakeholders to ensure we are all doing the right thing, how you can best support or intervene to ensure we are making the right progress and achieving what we are set out to do, whether it is a small task or major project.

Our Tool kit:-

Form, refine and maintain strong working relationships

"Name and know" team & peer top 5 strengths	Personal Reflection and Learning
How to include others in your plans	Workshop (TDC)
Communicating in a virtual/digital world	Workshop & Guidance
Giving and Receiving Feedback	Workshop & Guidance

Making it work:

Tap into your **Leadership Styles** ... know you and know your team ... This means checking in and taking an interest in them ... Its not all about work.
Be mindful of different communication styles and traits ... be sure to connect and check in with your key team regularly (at a minimum weekly).
Be mindful to choose carefully how you connect and communicate effectively with stakeholders ... Whether this is written, verbal, formal or informal
Understand your self and remember to consider your communication style.

You will be connecting in the following scenarios:

EVERYTHING YOU DO INVOLVES CONNECTION.
ALL ACTIVITIES AND TASKS YOU UNDERTAKE INVOLVES CONNECTION.

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11

Empowerment

Empowerment is about building a team who can do more by building a team structure where roles provide interesting work, clear guidance and freedom to operate. If a team is **Empowered**, you can spend more time on coaching, connecting, communicating and improving. When you empower you support growth and confidence.

Empowerment can create a sense of purpose and increase awareness of resources. It is most effective when you know your colleagues, and trust them to get a good job done. You can empower at various levels, individual or group, which develops through building relationship with others.

Our Tool kit:-

How to delegate effectively	Workshop TDC	All Leaders
Understanding Empowerment	Workshop TDC	All Leaders
Build Skills	Workshop TDC	All Leaders

Making it work:

Tap into your **Leadership Styles** ... know you and know your team ... What skills do they have to get the job done. How do they think and behave?
Understand your leadership traits and reflect on how much you get involved in the detail ... Do you need to be? If you do, ask yourself why?
Set a clear purpose with guidance so your team know the parameters in which they can operate in terms of decision making, autonomy and responsibility.
Identify and support any skill gaps which prevent you from empowering others ... How can you change that?

You will be **Empowering people** in the following scenarios:

MADD Reviews, 1:2:1, Team Meetings, reviewing and evaluating standards of health, safety and performance for your team and service, staff engagement, staff wellbeing and all other **Management** activities. Reviewing and improving policy, procedure and cultural norms. You will be empowering your teams through clarifying decision Making, Autonomy to carry out a task/role.

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12

Focus on Our Future 2017-2020

1st August 2017

Our Corporate Plan

Our Corporate Plan, Focus on Our Future was launched at our AGM last week. The plan sets out the strategic direction we will take between now and 2020.

Our **vision** is to continue to **make a difference** and all our future work must meet this expectation.

Our **mission** is **great homes, great communities** and we are committed to ensuring that our customers have homes where they can thrive, in communities they can feel proud of.

We believe that how we work with our customers and stakeholders is integral to what we do. As such, our **values** underpin the work we carry out and as staff we are committed to continuing to uphold them. **Teamwork, commitment, honesty, respect and professionalism** run through everything we do, helping our customers see and staff ensure that we are an ethical, responsible and accountable business.



FOCUS ON OUR FUTURE

OUR CORPORATE PLAN 2017-20



What are our Priorities?

We want to continue to build upon the foundations set down during the first six years. Our plans include delivering services which exceed customer expectations and investing in much needed homes.

Our plans are ambitions and we believe passionately in our social purpose.

Providing homes, building communities and delivering outstanding services will continue to be our driving force.

To achieve our vision, our priorities over the coming years will be to:

- 1 Invest in our current homes and communities
- 2 Develop our people
- 3 Maximise our use of technology to deliver what matters to customers
- 4 Build more homes and collaborate with other organisations

Finding out More

To find out more details about our plans behind each of our four priorities, you can find a copy of Focus on our Future [here](#)

To help summarise our plans we have also produced an animated video which can be found [here](#)



**Regular Progress Updates will Follow
Watch this Space....**





RECRUITMENT PLANNING MEETING WITH MANAGER

Role title:		
Manager name:		
HR Representative:		
	<u>QUESTION</u>	<u>ANSWER</u>
	Why has this vacancy become available? If replacement, who for?	
	Is the job title appropriate for external candidates (i.e. will external candidates know what the job is)?	
	Is this role permanent, fixed term* (if so, how long) or temp (temp is less than six weeks)?	
	If the role is fixed term, advise Manager that the following will be included in the advert: <i>*Please note that should the post be made permanent in the future, any existing post holder who has passed their Action Plan for Success will be offered the permanent role. No selection process will take place.</i>	
	Is the role part time, job share or full time? If part time or job share, how many hours/days worked per week?	
	Location/Base – where will the majority of time be spent working? <i>Please note that we can add both Ty Gwyn and homeworking to the advert as location should this be required</i>	
	What cost centre should the role go against?	
	Does this role manage people? If so, which roles?	
	Does this role have budget on P2P?	
	Who will be the Hiring Manager? Who will be the Line Manager? <i>(should be one and the same as Hiring Manager)</i> ? Who will involved in shortlisting? *Check if they have access right to the ATS or not. Who will be involved in first interviews? Who will be involved in Assessment/second interview?	
	Has the relevant Director given their approval to recruit? Is approval on email or business case? <i>(need a copy)</i> : New hires only. (For backfills, ensure Deputy Director or HOS is cc'd in on initial emails).	
	Is there an up to date role profile? <i>(cant proceed without one)</i>	
	What is the grade of the position? Has the role been through an IPE process? <i>The starting salary for the role should always be the 2nd scp point from the bottom of the relevant grade, ensure the Manager is aware of this.</i>	
	<i>Following successful completion of an Action Plan for Success, the salary for the role will increase to the penultimate scp in the relevant grade, ensure the Manager is aware of this.</i>	

Is a DBS check required for this role (seek guidance from HR if unsure, IHM, UC and FIT currently DBS'd)?	
Is Health Surveillance required for this role? (i.e. HAVS, Audio, Skin and lung)	
Is this role a White Fleet driver* (see guidance below)? This needs to be added to the role profile, advert and a pre employment driving assessment must be undertaken.	
Is this role a Grey Fleet driver? This needs to be added to the role profile, advert and business use insurance will be required before the person is allowed to drive.	
What are the start and finish times for this role (this should be reflected in the role profile and should be consistent with other position across the organisation?)	
Does the role fall under the flexi scheme?	
Method of application will be CV and possibly covering letter.	
Closing date :	
Should be advertised externally as well as internally?	
Where should this role be advertised externally (i.e. websites, publications, notice boards etc.)? AND/OR Where would candidates from this industry, profession or with these types of skills/background look for this type of role?	
Discuss potential involvement of recruitment agencies (justification is required, this will be subject to HR approval and only for Senior or "hard to fill" roles)	
What date will shortlisting take place? (see timeline)	
List 4-5 key shortlisting criteria for shortlisting stage	
What dates can be agreed for first interview? (see timeline)	
List 4-5 key competencies for first interview stage	
What date can be agreed for second interview (Assessment Centre)? (see timeline)	
List 4-5 key competencies for second interview (Assessment Centre) stage	
What initial ideas for the second stage Assessment Centre of the recruitment process does the Manager have (<i>link back to role profile</i>)? i.e. Competency based interview (mandatory) Group event Psychometric assessment?	

EV21

From: Amanda Jenkins

Sent: 04 March 2021 16:45

To: sarah.cosker@taitarian.co.uk

Subject: Statement for Sarah Cosker

Hi,

Sarah has asked if I could provide her with a statement in relation to her coaching and mentoring skills for her assignments within the CIPD course she is studying.

Sarah continues to grow and develop and her knowledge since starting her CIPD has had a profound impact on her confidence and ability to undertake the full duties for her role. Initially contributing to operational HR such as absence management and ER cases in an advisory capacity Sarah sometime lacked the confidence in her own ability, something that over this last year has improved considerably. Sarah is now stepping out of her comfort zone in advising managers and working on her coaching skills to get our teams to think more pro-actively and in line with our corporate strategy and core values. Sarah would have the ability to mentor a more junior colleague if needed but currently her role does not require this. I have continued to mentor Sarah since I started in the organisation nearly 2 years ago, therefore she has first-hand knowledge of this and is therefore more than capable, if needed to do so, and advise managers on doing so.

Her natural inquisitive nature is her greatest strength because she challenges people and situations to ensure we deliver best practice and employee support that is second to none. I hope that as she continues to develop and grow, she can bring these learnings into other areas of the business because her creativity and imagination is something, we could tap into for developing some of our employee initiatives.

I hope this helps and if there is anything more you need from me please do not hesitate to ask.

Kind Regards

Amanda

HR Business Partner

Tai Tarian Ltd.

Tŷ Gwyn,

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Neath,

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SA11 2FP

General Enquiries: 0300 777 0000

Website: www.taitarian.co.uk

EV22

From: Sarah Cosker <Sarah.Cosker@taitarian.co.uk>
Sent: 03 November 2020 12:19
To: [REDACTED]
Subject: Follow up - Action Plan for Success set up meeting

Hi [REDACTED],

Lovely to have a catch up today !

Following on from our meeting, as discussed in relation to setting up an Action Plan For Success for [REDACTED],

Please ensure to consider the:

- Role profile
- APFS guidance
- Tai Tarian values and mission statement
- Tai Tarian Behaviours
- Tai Tarian Corporate plan

All found via the intranet in the "Managers Hub",

if you would like me to look through before your Action Plan for Success meeting with [REDACTED] or have any further questions around this please let me know,

Many thanks,
Sarah

Sarah Cosker

HR Advisor

Tai Tarian Ltd.
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Tel: 01639 508650
General Enquiries: 0300 777 0000
Website - www.taitarian.co.uk

EV23

From: Sarah Cosker
Sent: 23 September 2020 11:53
To: [REDACTED]
Subject: Conflict Resolution Procedure
Importance: High



Conflict Resolution
Procedure.doc

Hi [REDACTED],

Further to our telephone conversation,

I have attached the conflict resolution procedure which included the process and form required to submit a grievance (form in appendix – GR1).

Just to confirm we discussed the options in relation to the current situation between [REDACTED] and [REDACTED]

Please speak to [REDACTED] and confirm the options to him:

1. We can arrange a mediation session between [REDACTED] and [REDACTED] – (if [REDACTED] does not think this will be effective, XXXXXX will need to raise a grievance)
2. [REDACTED] can raise a grievance and we will then process as per the policy – (if [REDACTED] would like to do this please ask him to complete and return the form asap in order to get this situation resolved as quickly as possible).

If you have any questions please let me know,

Many thanks

Sarah

Sarah Cosker

HR Advisor
Tai Tarian Ltd.
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Neath,
Neath Port Talbot,
SA11 2FP