

Qualification: CIPD Diploma in Applied Human Resources

Module Name:

Contributing to Coaching and Mentoring in the Organisation

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Personal Statements – **2885**

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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:



Date: 04/07/2021

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<u>DUNCAN HOOK</u> <u>EVIDENCE MATRIX</u>				CIPD Membership No: 5665008X		
Qualification: CIPD Level 5 Diploma in Applied Human Resources				Unique Learner No. (ULN): 1920325		
Unit code	Unit Title	Assessment Criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1	Extract from 'Pembrokeshire County Council Coaching Policy (2019-2021)' outlining Purpose, Contracting, Ethics, Roles/ Responsibilities and Coaching Timeline	EV1		
5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1	Extract from 'Pembrokeshire County Council Coaching Strategy (2019-2021)' outlining Aims, Benefits and Defining Coaching	EV2		
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5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1	Meeting notes from meeting with Coaching Coordinator	EV4		
5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1, 1.2	Example of proposed set of interview questions sent to Managers ahead of Coaching and Mentoring Interview	EV5		
5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1, 1.2	Interview notes from interview with IT Manager on their experience of Coaching and Mentoring	EV6		
5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1, 1.2	Interview notes from interview with Social Services Manager on their experience of Coaching and Mentoring	EV7		
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5ADCM – 1A1007	Contributing to Coaching and Mentoring in the Workplace	1.1, 1.2, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4,	PCC Document - Learning and Developing 'What is Coaching' information/factsheet	EV15		
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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:

04/07/2021

LO1. Personal Statement: Assessing the impact of coaching and mentoring activity within Pembrokeshire County Council and making recommendations for further development

1.1

My approach to investigating the current integration of Coaching and Mentoring in Pembrokeshire County Council (PCC) was to start with the work that L&D were already implementing in this area and then to work out from there (Clutterbuck, et al., 2016, pp. 56-57); starting with leadership and then focussing on their direct reports gauging the impact of coaching and mentoring on each.

It was apparent from interviewing the Coaching Coordinator, within L&D (EV4) that there was a lot of work in progress to both train a group of 12 coaches who will imminently receive their 'ILM Level 5 Coaching and Mentoring qualification (Institute of Leadership & Management, 2021) and introducing coaching culture to the wider organisation.

Much of the focus in terms of Policy (EV1) and Strategy (EV2) are around the development of coaching practice rather than mentoring. This is methodically structured with clear contracting arrangements that are intended to link coaching to organisational needs and a limit on the number of sessions per coachee. Although this may appear to limit this resource per employee, according to the coaching coordinator this is intended to slowly influence the culture of the organisation focussing on as many areas as possible and making coaching culture 'the norm' (Clutterbuck, et al., 2016, pp. 81-82).

As expected with the wide breadth of services operating within PCC, there were varying levels of success when it came to embracing coaching and mentoring and the coaching coordinator pointed me in the direction of examples of each (EV4). In my capacity as Employee Relations Adviser these are already services I support and so access was not a problem. I decided to conduct manager interviews to audit the implementation of coaching and mentoring within their respective services (Clutterbuck, 2016, pp. 69-70).

When interviewing Managers within IT and Social Services (EV6, EV7) it was clear that they have utilised L&D and are using coaching and mentoring techniques. Mentoring fits well within the supervision structure of social services. Every social worker is supervised by a senior social worker who meets every month to review caseload and listen to other concerns. The coaching angle is covered by managers currently although they hope to expand this further over time. IT have similarly focussed on managers when it comes to coaching with them learning the techniques and working on them with the team with a positive response.

Both Finance and Building Maintenance, although very different services, were far less familiar with coaching and its benefits, rather seeing it as a luxury that would take time (EV9). Both felt that they had good mentoring in place but it was very much considered a directive teaching tool which goes against the spirit of this initiative (Landsberg, 1996, p. 8). It was also not considered as having any wider cultural impact on the team or developing long-term professional relationships. Both of these services, however, recognised the need for support within their teams especially when they were not available to meet directly with staff.

1.2

In my capacity as Employee Relations Adviser, an angle I have been interested in is the wellbeing of staff and its impact on absence management. During the pandemic, remote working has proven to have had a negative impact on many people's mental health, with the lack of connection a contributing factor (Winfield, et al., 2020). Both IT and Social Services, who have begun to

implement coaching at a management level have reported having improved connection with their teams and this is reflected in low absence and higher engagement. Particularly during periods of enforced lockdowns, the IT team saw the benefit of increased autonomy amongst the team where coaching techniques have been used; Autonomy referenced as an essential factor in employee satisfaction (Wietrak, et al., 2021, p. 5). Mentoring has been helpful in giving both Social Services and IT motivation with clear pathways for development and as a result, the teams are staying with PCC and progressing their career (Royal, 2019).

Finance have struggled during the last year as work from home orders have separated the teams and stretched managers to their limit. There have been multiple cases of burnout and higher than average cases of mental health related absence. Unilever found that mentoring had a huge impact on the wellbeing of staff working remotely as it gave a consistent channel for staff to share experiences (Sharma, 2020). They have also encouraged their staff to really work on developing these relationships so that the mentor can really understand what it is that the mentee is aiming to achieve.

For some of the Accountants team, mentoring has been successful in giving them a career structure and guidance in their development (EV8) but for others (EV20) the lack of structure has meant stalled development and an increased reliance on external hiring.

Both Finance and Building Maintenance cite mentoring as essential in training new members of the team but it is clear that without proper structure in place, team members have been forgotten and the workforce is not as effective as it should be (EV13). While mentoring can be hugely beneficial, not everyone is suited to being a mentor. Life experience of success and failure as well as the relevant soft skills are all important to ensure that the relationship doesn't have a negative impact on the mentee (Llopis, 2012)

1.3

The Authority's Transformation team introduced the 'New Behaviour Standards' (EV10) in 2019 with a two-year plan to start cultural change within all departments. The policy and strategy for coaching implementation were devised to realise that vision (EV1, EV2) with a wider HR strategy (EV11) that gave clear measurable goals for the next two years in achieving this culture (Clutterbuck, 2016, p. 64). The pandemic has undoubtedly had an impact on the delivery of these goals with HR and L&D tied up with pandemic specific tasks and the training of new coaches postponed by 6 months (EV4).

When discussing with managers the 'blocks' for introducing a coaching culture, the main response has been the time investment required which Landsberg recognises as a key concern in managers who want to be in total control of the process (1996, p. 43). Although they have been told of the long-term benefit of a more autonomous team, they are aware of the initial requirement to coach their teams and this is seen as concern. L&D have already planned for this with the 12 trained coaches who sit outside of service areas allowing for change to happen even during busier times which has been presented as a solution to this.

Far more challenging in the long-term is the structure of certain services. While IT and Social Services have a flat structure where feedback is welcome and input is expected from all levels of the team, Finance and Building Maintenance still operate in a hierarchical structure where the idea of open feedback or reverse mentoring are not easily accepted although these have been shown to improve engagement and productivity in teams (Crowley, 2019).

There is also a cultural challenge with these two services on the benefit of learning and development with a feeling from managers that staff will not see coaching as helpful to them (Landsberg, 1996, p. 43). While the teams see the need for training on day-to-day operational tasks, they have struggled to see the relevance of these other forms of development to their role so coaching culture is not a priority to them. Clutterbuck (2016, p. 14) refers to this stage of coaching culture development as the “nascent” stage where coaching is poorly thought of and work is to be done in winning the managers round to understanding and appreciating the merits of investing time into coaching.

1.4

The recommendations I have made are specifically focussed on the service areas of Building Maintenance and Finance as these are the areas who have been most recently impacted by burnout, despondence in the team and turnover of staff (EV13). These two services are also highlighted as either not utilising coaching and mentoring at all or misunderstanding its purpose (Llopis, 2012).

I made recommendations to L&D based on my experience with these services as well as offering direct recommendations to the leaders in these departments. After partnering with the coaching coordinator, it was agreed that introducing coaching culture would be a long term goal due to the hierarchical structure of these services. Instead, the short term goal would be to develop managers understanding of the benefits of coaching first by setting them up with a taster session with this recognised as an effective way to communicate the benefit through positive experience (Clutterbuck, 2016, p. 49).

The larger short term focus was on fine tuning both services approach to mentoring. Finance and Building Maintenance were already comfortable with this structure but I felt that the managers should be closer to this process and see it as an important part of their team’s development (Cronin, 2019). Mentoring would help deepen connections within the team, while growing talent within the organisation at a time when recruitment was more difficult in the current labour market.

LO2. Personal Statement: Supporting the implementation of coaching and mentoring programmes within Pembrokeshire County Council.

2.1

As it was recognised that getting buy in from leadership was the first step, I met with managers in both Finance (EV20) and Building Maintenance (EV25) to discuss my findings so far and the recommendations I had made.

I felt that mentoring was being misused in both services as simply a training tool and so I talked through the benefits of a structured and considered mentoring programme based on the “Formal Mentoring” outlined by Clutterbuck et al (2016, pp. 173-176). This approach is a balance between providing structure, preparation and measurable goals while also remaining a non-directive process. I also reintroduced coaching to these managers; sharing the strategy and policy already in place at PCC as well as outlining the vision for coaching culture and why I felt it would benefit their services in creating an autonomous and motivated team (Clutterbuck, et al., 2016, p. 56).

From my previous interviews there were already some barriers which had been raised. Both raised concerns about the attitude of the team towards coaching and they therefore didn’t think they would engage with it properly (Landsberg, 1996, p. 43). I explained that for this reason I felt we should begin with taster sessions for managers only, to help them understand and be able to communicate the benefits before any other team members would receive coaching.

The Finance managers were also concerned about disrupting mentoring relationships which already existed. We therefore agreed that any changes would be initially focussed on team members who were not in pre-existing mentoring relationships, with no pre-defined goals or agreements (Horoszowski, 2020) before reviewing existing relationships with others at annual performance review.

2.2

The bulk of my work with Finance has been in developing a formal mentoring structure that we plan to grow over time. We looked at the benefits of enhancing the mentoring that was already in place with its developmental impact on both sides of the relationship (Crowley, 2019). Due to the feedback from staff (EV19) who were seeking progression and the problems with retention that have surfaced, it was felt that mentoring based on clear career pathways in Finance would be beneficial in opening up conversations about development (Carayol, 2019).

I mapped out the key roles in finance (EV26) based on their role profiles in job evaluation and partnered with the managers on which key skills, qualifications and competencies were required for each role. The managers used this as a base for determining effective mentoring partnerships which we established would be reviewed on a twice annual basis. Clutterbuck concedes that although mentoring relationships are intended as informal and left to develop naturally, it makes sense to review their effectiveness and determine whether the relationship is still beneficial (Clutterbuck, 2012). Our intention was that this could start small, with three to five mentoring relationships established, but expand from there (EV30).

Before this began we established what our aims for this process were with established long term relationships and motivated staff as primary aims and better retention, promotion of internal staff and reduced absence as secondary aims.

Based on recent interview experiences (EV19) I also gave some suggestions of individuals who could be early participants launching from their Annual Performance review (Clutterbuck, 2012, p. 175).

The managers I met within Building Maintenance have so far been unable to engage with coaching and mentoring beyond our initial meetings although I have proposed a similar approach in structuring mentoring around career pathways.

2.3

Part of the challenge in introducing coaching culture at PCC has been in the perception by managers of what coaching actually is, with it largely considered to be another word for training (Snape, 2018). After spending time discussing the benefits of non-directive coaching (Landsberg, 1996, p. 9), I provided managers in both Finance and Building Maintenance with access to an internal e-learning course on coaching and other documents which would expand their knowledge (EV14, EV15, EV16, EV17).

Most successful, I feel, have been the coaching taster courses, which served as both an experience in how beneficial coaching can be and were coupled with a session with the coaching coordinator on how they could apply what they experienced to their management style (Clutterbuck, 2016, p. 49).

As the mentoring partnerships in finance have been established for the last few weeks, I am now in the position to meet with mentors and assess any challenges they have been facing and any additional training that is required (EV36). Clutterbuck et al (2012, p. 175) explain that this is not just a focus on the knowledge of the mentor and mentee but also of the managers supporting the process and so this will become part of this review to ensure the programme is a success.

Similarly to coaching, L&D have an e-learning course available for mentoring skills but this only really serves as an introduction so future support from the coordinators themselves may be required in future.

2.4

Before I began discussing mentoring with managers in Finance, I had already taken part in three feedback sessions for unsuccessful interview candidates (EV21) over the past few months. These individuals had all applied for roles multiple times and had worked in the department for years gathering a wealth of experience. These individuals had apparently never had a longstanding mentoring relationship and had no idea of the benefit it could have for them (Clutterbuck, 2012, p. 174) so this was a factor in this recommendation. I met with one potential mentee at the start of this process (EV22) to understand her needs and this fed into the planning process for a mentoring structure. Since this accountant has now been partnered with a mentor I reached out to meet her again to discuss the arrangements so far and offer some advice and encouragement to get the most out of the mentoring relationship. We have agreed to meet again later this year to review the impact that mentoring had made on the organisational goals, team cohesion and with the goals the mentees have set themselves (Clutterbuck, 2012).

Similarly, with the managers who have partaken in coaching sessions, I have encouraged them to take this further as they fed back that the sessions were useful in generating ideas and experiences that they knew would help them develop (EV32). I recognised that they had some discomfort with being coached by a junior member of staff from within PCC so have encourage them to utilise the external coaches that L&D can organise (EV38).

2.5

The mentoring structure project in Finance is still in its infancy and there will be a period of monitoring for the first wave of relationships before this is expanded further. As I will continue to support Finance into the future I will continue to meet to discuss how this work has benefitted the individuals and the department (EV31) (Clutterbuck, 2016, p. 175)

After discussing with the managers, they have agreed to review with the mentors and mentees after a month, then every quarter from then on. This will focus on identifying any training opportunities for either party and to gauge satisfaction with the developing relationship (EV30) (Clutterbuck, 2012). We have also agreed on some measurable long-term factors including comparable retention of staff, success of internal applicants at interview and sickness absence levels (Hayden, 2020).

When discussing this with L&D, the long-term plan has been to focus on mentoring with Finance to begin with and then to explore opportunities with reverse mentoring and coaching within the Finance team (EV38). There is a fear within this service of breaking from hierarchical structure but it is recognised that everyone needs a voice.

Looking further ahead this year I will continue to work with Building Maintenance to try to apply the same model to this team. I am keen for the managers there to experience coaching in order to become advocates for the rest of the department (Clutterbuck, et al., 2016, p. 56). L&D have conceded that introducing coaching styles to non-corporate roles has been challenging in the past but are confident that we can get buy in from them.

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Introduction

Coaching is a widespread and respected aspect of HR and management practice. Reliable surveys, such as those conducted annually in the UK by the Chartered Institute of Personal Development (CIPD), show it rising in popularity due to the effectiveness, benefits and the return on investment it provides. Its power to change mind-sets and to move individuals to action is widely appreciated in organisations.

Purpose of the coaching policy

The purpose of this policy is to:

- Outline when coaching is an appropriate intervention
- Describe the roles of those involved with coaching
- Identify what support and continuing professional development is available to accredited coaches
- Describe the process for accessing coaching
- Describe the process for training internal coaches
- Describe the success criteria and evaluation of coaching interactions

When is it appropriate to use coaching?

Coaching is a voluntary, confidential process that takes place within the Authority in four areas and provides appropriate support to:

1. Senior Leaders (Director Level/ Heads of Service/Cabinet Members)

Executive coaches (trained to ILM Level 7 or equivalent) from our external network are available to provide coaching to meet identified learning needs for instance:

- Leading the organisation effectively through sustained periods of transition and change
- Continuing to examine and develop leadership styles
- Enhancing performance

2. Elected Members

Coaches (trained to ILM Level 5 or equivalent) from our pool of internal coaches or the WLGA are available to provide coaching to meet identified learning needs for instance:

- Addressing current or new political and/or legislative challenges and opportunities
- Undertaking role changes
- Continuing Professional Development (CPD) for councillors

3. Managers

Qualified and experienced internal coaches (trained to ILM Level 5 or equivalent) are available to coach managers to meet identified learning needs and opportunities, for example:

- Needing to gain a more strategic perspective
- Extending their management/leadership abilities to be even more successful
- Developing a growth mind-set
- Transitioning to senior roles
- Exploring creative and innovative ways of working
- Leading and managing change within their teams
- Supporting and developing their team members

4. Employees

With line managers under pressure to do more with less there is now a strong focus on team and individual performance. To help meet these pressures, Learning and Development are supporting managers to act as the coach, encouraging them to use coaching skills to improve the performance of their team and its members. It has been identified that managers with strong coaching skills are able to help individuals improve their performance by building understanding about:

- What effective performance looks like
- How to achieve it
- How to build competence for the future

As the coaching capacity of the Authority builds it is anticipated that the vast majority of coaching at employee level will be undertaken by line managers using a coaching style of management.

Learning and Development are supporting this initiative by delivering a leadership and management programme that will help foster and develop a coaching style of management. As a result, managers using coaching skills will be able to develop high performing teams that meet the performance requirements specified in our Behavioural Standard.

Internal coaches will be available to coach individuals if more specialist help is required.

Internal coaches

A pool of qualified internal coaches is managed by Learning and Development.

How do we source external coaches?

Executive coaches (trained to ILM Level 7 or equivalent) are obtained through the Wales Coaching Network.

A coach from outside the public sector will be sourced by Learning and Development if there is not a suitable coach available from our public service networks. We have a pool of external coaches that we have built up over the last four years. These have all been recommended to us. Interviews have been carried out, either face to face or by telephone, to establish their suitability to work with the organisation.

Senior leaders are able to select their coach from this pool.

Coaching for Members is provided by the Welsh Local Government Association (WLGA) or by our bank of internal coaches depending on individual learning needs.

Payment of External Coaches

Invoices for external coaching are sent to the Learning and Development Administrator for payment.

Contracting

Although the primary relationship is between the coach and the individual there will be other key stakeholders, including the organisation, Learning and Development, the individual's manager and the internal coach's line manager. All of these parties have an interest in the success of the coaching process.

The 2013 Riddle Report pointed to evidence that "good contracting practices build the foundations for evaluation processes....and successful coaching outcomes" with three way contracts between the client, manager and coach being seen as a key mechanism.

The impact of three way contracting includes:

- Linking coaching outcomes to organisational needs and strategic development
- Making the outcomes more transformational and challenging

The key benefits of three way contracting include:

- Jointly setting clear and specific goals, focussing on outcomes and actions so that the coaching delivers both individual and organisational benefits
- Clarifying the roles and expectations of all parties
- Establishing clear boundaries and protocols
- Ensuring honesty and transparency in communications
- Identifying how success will be measured
- Ensuring that the manager is supportive of both the individual and the coaching process

Three way contracting between coach, client and manager is a vital part of the coaching process and will take place where possible.

Clients are offered between 3 and 10 coaching sessions. This is dependent on an agreement from the client that they will undertake an evaluation to ascertain that the coaching they are receiving is effective and that the identified objectives for the coaching are being met.

Record Keeping

All information that we hold concerning coaching will be retained and processed by Pembrokeshire County Council Learning and Development, strictly in accordance with the provisions of the General Data Protection Regulation 2016, as set out in our Privacy Notice. A full version of this notice can be viewed on the SCWDP Webpage within the Pembrokeshire County Council website. Alternatively, a paper copy can be provided on request at courseapplications@pembrokeshire.gov.uk

At the end of the coaching contract any information recorded (paper and electronic) should be either handed to the client or destroyed.

Confidentiality

Confidentiality is essential in coaching but there are exceptions. Sometimes coaches may need to break confidentiality if there is:

- A breach of the authority's code of conduct
- A breach of organisational policies and procedures
- A breach of health and safety policies
- A person being at risk to themselves or others
- Disclosure of illegal or unethical actions or activities
- Discussion of case work with a supervisor
- Submission of notes as part of a coaching qualification (these would be anonymised)

Ethics and Competency

As members of the Association for Coaching we are bound by their [Competency Framework](#) and [Global Code of Ethics](#).

Where an ethical dilemma arises, coaches should seek advice from their supervisor. Please see further details on page 6.

Roles and Responsibilities

Individual's line manager

The Performance Appraisal process provides the opportunity for the line manager and individual to identify specific development needs and opportunities that are best addressed through coaching. Coaching is a voluntary process and will only work if the individual is prepared to make changes and explore how to make the most of their skills and abilities.

Managers and individuals will need to assess whether they can work together towards the desired outcomes or whether there would be benefit in using an accredited coach from elsewhere in the organisation. Coaching should not be used as a means of abdication responsibility and managers have a role in supporting the learner through the coaching process and in monitoring and evaluating the success of the coaching intervention.

Individual client

If a development need is identified which requires a coaching intervention external to the line management relationship, the individual learner will need to apply by completing the specific application form.

Individuals receiving coaching from an appointed coach will be required to keep their line manager informed of progress against their objectives but not the details of the confidential 1:1 discussions with their coach.

ILM qualified coaches

ILM qualified coaches have been specifically trained to support the development of individuals and enable them to reach their potential.

A number of these coaches work within Learning and Development whilst others work within the wider organisation. Coaches that are employed in the wider organisation and have become accredited ILM coaches are required to commit to a minimum of 12 hours coaching per year with a minimum of two clients per year. This coaching commitment includes planning, organising, running and evaluating coaching sessions. Coaches are also required to provide a monthly return of their coaching hours.

ILM qualified coach's line manager

Once accredited as an ILM coach it is expected that the coach's line manager will release them so that they can undertake:

- a minimum of 12 hours coaching per year with a minimum of two clients per year.
- two hours' supervision over the year
- ten hours continuing professional development (CPD) spread over the year

Coaches will also need up to an hour a month when actively coaching to complete PCC's coaching paperwork.

In total, line managers should therefore anticipate a minimum time commitment of two hours per month.

Any coaching above these minimum requirements will be negotiated locally between the coach and their manager.

Learning and Development

Learning and Development will maintain a database of ILM qualified coaches both within and outside the organisation to facilitate matching individuals to the most appropriate coach. Learning and Development will also monitor, evaluate and quality control accredited coaches.

Learning and Development will train managers in coaching skills through the Leadership and Management Programme. This will have the added advantage of embedding a coaching style of management within the organisation which in turn will lead to a coaching culture.

There may be times when the demand for coaches will exceed the numbers available. If this situation arises, allocation of individual learners to coaches will be prioritised according to organisational priorities.

All personal information held on individual learners e.g. application forms are held in accordance with current Data Protection legislation.

Access to an accredited coach

Coaching can be accessed by completion of an application form available from the intranet or Learning and Development.

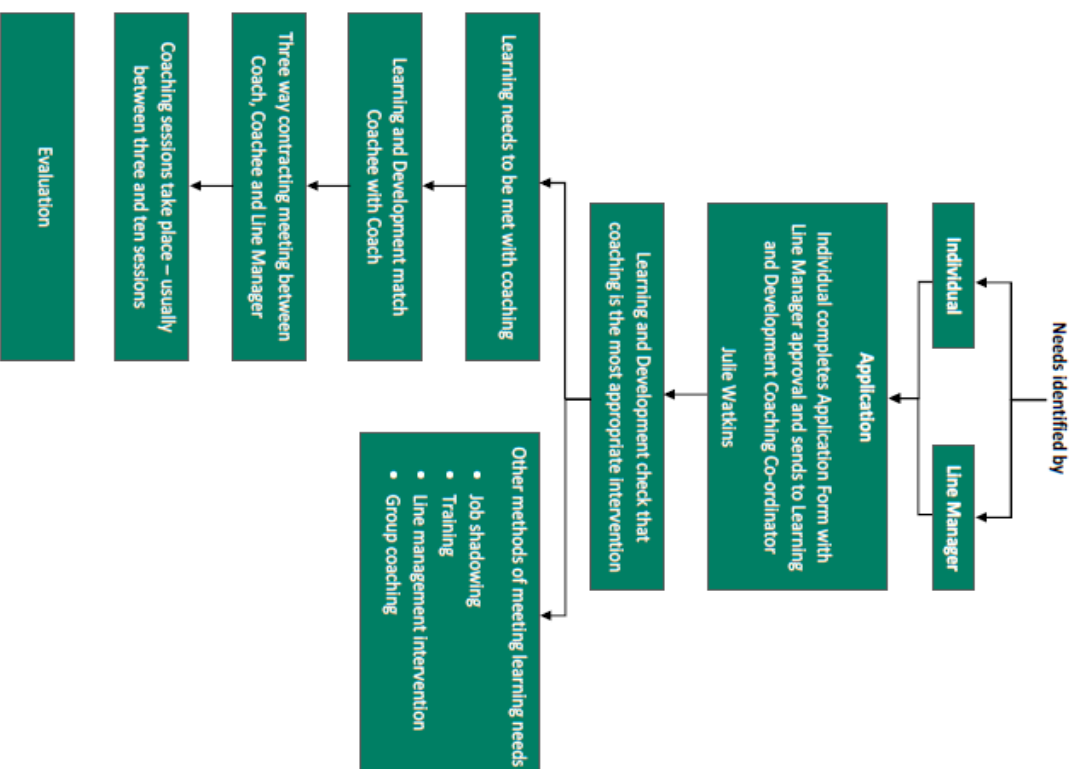
Coaching coordinator

On receipt of a completed application form, the coaching coordinator will allocate a suitable coach. The application form will be forwarded to the coach who will then make contact with the individual learner and their manager to enable three way contracting to take place.

The coaching process

The coaching process is illustrated in the flowchart attached at Appendix 1.

Usually takes place over 4 to 6 month period



Executive Summary

The purpose of the Coaching Strategy is to provide an overview of how coaching will be developed in response to the current and future needs of the organisation.

Pembrokeshire County Council has, and will continue to, experience significant change as a result of unprecedented financial challenges. The strategy will support the work of the Transformation Programme, particularly around Culture Change, and also Strategic Workforce Planning as set out in the HR Strategy and the Learning and Development Strategy.

Coaching is a widespread and respected aspect of HR and management practice. Reliable surveys, such as those conducted annually in the UK by the Chartered Institute of Personal Development (CIPD), show it rising in popularity due to the effectiveness, benefits and the return on investment it provides. Its power to change mind-sets and to move individuals to action is widely appreciated in organisations.

This strategy should be read in conjunction with our Coaching Policy which sets out the framework and processes that Learning and Development will implement to support the strategy.

Strategic aims of coaching for Pembrokeshire County Council (PCC)

The aims for championing and increasing the use of coaching within PCC include:

- Developing our leaders and managers to thrive within the volatile, uncertain, complex and ambiguous environment that our organisation is operating within.
- Shaping and developing the preferred culture for our organisation, enabling it to be a culture of learning, purpose and results.
- Encouraging the creativity and innovation necessary to meet the continuing austerity challenges
- Meeting our duties under the Well-being of Future Generations (Wales) Act 2015
- Continuing to have a targeted and timely approach to addressing the individual needs identified through Performance Appraisals (PA) and the objectives set out in the Corporate Plan and Service Plans.

In order to embed coaching within our organisational culture, Senior Leaders will be offered the opportunity to have an external executive coach as part of the Transformation Programme. Managers will also be offered coaching sessions through our pool of internal coaches as well as the opportunity to attend the Manager as Coach course in order to develop an all-inclusive coaching culture which has the potential to accelerate talent development and realise potential, which ultimately may lead to higher and more sustained levels of performance.

Our pool of internal coaches will be expanded through a programme of ILM Level 5 training, with the aim of having around twenty qualified coaches by the end of 2020.

What is the purpose of coaching?

Coaching is a highly effective way of developing individual and organisational performance. The CIPD's 2015 annual report shows that three quarters of organisations currently offer coaching or mentoring and an additional 13% planned to offer it in 2016. Most expect to increase their use of coaching.

A broad range of benefits from coaching have been identified including improvements in leadership and management, management performance, communication and interpersonal skills, conflict resolution, personal confidence, attitudes and motivation, as well as preparation for a new role or promotion.

Coaching is also one of the most powerful and effective ways to learn as it provides long-term impact for both the individual and the organisation.

The benefits of coaching

The annual CIPD Learning and Development survey identified direct benefits from coaching.

Organisational benefits include:

- Enhanced organisational performance
- Improved implementation and acceptance of change
- Improved and increased leadership and management skills
- Development and adoption of a new culture
- More effective succession planning
- Improved communication
- Greater employee engagement and commitment
- Increased motivation of employees
- Conflict resolution
- Engaging and retaining high calibre staff

Individual benefits include:

- Enhanced individual performance
- Improved and consistent leadership and management skills
- Improved communication and interpersonal skills
- Increased ability to identify solutions to specific work-related issues
- Greater ownership and responsibility
- Development of self-awareness
- Improved relationships between individuals and departments
- Conflict resolution
- Increased motivation
- Increased self-confidence and self-esteem
- More positive attitudes and behaviours
- Individualised and accelerated learning and development

• Preparedness for a new role or responsibility • Reflecting and testing out of ideas and plans • Reinforcement of learning from more conventional training programmes Benefits to the coach: • The learning gained through completing an accredited training programme will develop and improve the coach's own leadership and management skills • The opportunity to work with others in the organisation will provide the coach with the chance to network and gain a better understanding of how other parts of the organisation operate What is coaching? The essence of coaching is that it encourages people to take responsibility for themselves, to find their own solutions, develop their own skills, and change their own attitudes and behaviours. Coaching is successful because coaches work with <i>process</i> rather than content. A key characteristic of coaching as opposed to other kinds of intervention is that the coach needs no expertise in any specific subject matter. They work purely with the thinking, feeling and behavioural aspects of their clients and this is one of the reasons it is so influential in effecting change. Coaching raises self-awareness, identifies limiting mind-sets and non-helpful behaviours and identifies alternative choices. It is able to get beyond the presenting symptomatic issues and get to the root or heart of what needs to happen to effect change. Coaching is not intended to be a remedial action for staff with performance issues. Good coaching is about individuals performing at the best of their ability – it is closing the gap between potential and performance. It is about achieving a high performance culture, not managing a low performance one. What coaching is not Mentoring Mentoring in the workplace describes a relationship in which a more experienced colleague uses their greater knowledge and understanding of the work or workplace to support the development of a more junior or inexperienced member of staff. Mentoring relationships tend to be longer term than coaching arrangements. Psychotherapy or counselling Psychotherapy and counselling are umbrella terms that cover a range of talking therapies. The individual and therapist set time aside to talk about life events, feelings, emotions, relationships, ways of thinking and patterns of behaviour. The therapist will do their best to help the individual to look at their issues, and to identify the right course of action for them either to help resolve the difficulties or help them find ways of coping.	What is internal coaching? There are three types of activity that fall under the banner of 'internal coaching': 1. The line manager uses coaching skills in order to improve the performance of their team and its members. This form of coaching focusses on immediate performance and problem resolution. 2. An individual is allocated an internal Institute of Leadership and Management (ILM) accredited coach who offers the equivalent service and operates to the same standards as an external coach. Internal coaches have to be competent to practise so they are subject to the same rigour in selection, development and measurement of effectiveness. 3. Team coaching - although traditionally thought of as taking place on a one to one basis coaching can also be successfully used in a group or team environment. This process is carried out by ILM accredited coaches from within Learning and Development and they again will be operating to the same standards as external coaches. External coaches A pool of qualified external coaches will be utilised in the following instances: • When there is no suitable internal coach • When an executive coach is required for senior leaders and a suitable coach cannot be accessed via the Wales Coaching Network Executive coaching Executive coaching has become a widely used practice in the world of leadership development. It is a tailored process that benefits both the individual and their organisation. The current climate places pressure on senior leaders. Executive coaching offers an excellent way to combat many tactical issues whilst building the skills and abilities needed to be a strategic thinker and transformational leader. The pool of qualified professionals aims to help those in senior positions to navigate complex political environments, work through strategic challenges and gain greater understanding of themselves and others. Chosen for their experience and expertise in public service, they understand the context of public service leadership and the environment in which senior leaders operate. Supervision for ILM qualified coaches PCC is committed to the quality of internal coaching and as such provides structured supervision from external qualified, professional supervisors.
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EV3

-----Original Appointment-----

From: Hook, Duncan

Sent: 03 May 2021 15:00

To: Watkins, Julie; Abbott, Sharon

Subject: Coaching and Mentoring PCC

When: 11 May 2021 10:30-11:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi there Julie, I hope you're well.

Sharon Abbott and I are studying for the CIPD Level 5 and are currently researching PCC's approach to Coaching and Mentoring. Having read the Coaching Policy and Strategy online, we hoped to get some time with you next week to talk through this and ask a few questions about the current reality during the pandemic.

Would you be available for this?

Thanks for your help,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

Haverfordwest

SA61 1TP

Duncan.Hook@pembrokeshire.gov.uk

EV4

Meeting: Julie Watkins, Coaching Coordinator - 11/05/2021

Proposed Questions:

- **What preparations did you make before implementing the coaching culture in PCC?**
- **How has take up been? Any pushback?**
- **Any great examples of coaching that stand out? Any areas with opportunities?**
- **Has the pandemic (and remote working) been a challenge for coaching?**
- **How much have we utilised external coaches?**

Notes:

Coaching been in place for about four years before J took it on in 2019

Approached as a Transformation project for cultural change – came from the top – Harvard business model

We started with Senior Leaders asking them where they wanted the culture to be and what was standing in the way. Then proposed changes

Behaviour standards were created as a benchmark to attain the desired culture – managers knew what the culture needed to be with the behaviours which underpin it

Took a long time to get buy in from managers but found one who could advocate the value of coaching – new CEO is an advocate of coaching so bright future

The aim has been to change management style across the authority.

We need staff to be more autonomous – Dan Pink's Drive Theory is a focus for L&D with autonomy of staff being a key motivator and good for wellbeing

Coaching should allow managers more time to manage rather than firefight

We worked on coaching conference this year

Previously there has been a small pool of coaches mainly within L&D and SCWDP. We want to expand pool of coaches and include other areas and further the influence – offering more managers coaching training – ILM Level 5 coaching

This pool have come from all over but quite a few in Social Care (they get it)

12 new coaches finishing in June 2021

36 hours per year

Coaching training continued during lockdown but was slowed with breaks during worst times

Some found remote working harder as not face to face which they were used to - One coach "said it saved them" during lockdown as they could maintain connections on daily basis

IT have been really receptive – had a team day early in 2020 with Gareth and Lee where focussed on best coaching practice – they have a flatter structure and heads of service aren't afraid of getting hands on

Finance have traditional order of command and this holds back coaching methods

Our long term focus is on mental health. There is a crisis coming with this and the pandemic has accelerated. We'll be working closely with HR to identify areas with potential risk of mental health with further benefits to work performance

Performance + Wellbeing top priority

Too much email traffic – Email stress module on POD – MIND CEO with good example of promoting emailing flexibly

External coaches – Academi Wales – a great resource but we aren't using enough. Free coaches from a range of sources – JW on there as a coach and has found it useful during the pandemic as you can very quickly meet with someone from South Wales – no travel time for coaching

Academi have Explore & Walk event with a focus on being away from work to change insight – really valuable manager training initiative

Coaching at PCC is not remedial – we don't want trouble cases referred as it is about building confidence

3 way contract coach/manager/coachee – also promoting manager behaviour on a two way basis

Confidentiality/ethics very important – supervision key part of this. JW being trained as supervisor to support new coaches



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 12 May 2021 09:51
To: Johnson, Gareth <Gareth.Johnson@pembrokeshire.gov.uk>
Subject: Interview Questions

Hi Gareth, thank you for agreeing to meet with me on Friday.

As I mentioned, I would like to get a good understanding of how you and your team are currently using coaching and mentoring as well as looking at where you plan to take this next.

Instead of springing the questions on you I thought it would be helpful to send you a rough outline on what I wanted to ask ahead of time. If you have time beforehand, please take a look at the below:

- What are your own experiences of being coached or mentored?
- What do you see as the value in coaching and mentoring?
- How do you cater for mentoring and coaching in the IT department?
- Do you feel that managing in a coaching style is helpful when working with your teams?
- What benefits do you see or have seen with coaching and mentoring in IT?
- Is there anything you want to do more of with your teams?
- Are there any barriers you have faced or are facing to implementing coaching and mentoring further?

I look forward to talking on Friday.

Thanks,
Duncan

Duncan Hook
Employee Relations Adviser

EV6

Interview Notes:

Gareth Johnson, Manager, IT (PCC)

Friday 14th May 2021

-I've had the same mentor for over 10 years while at PCC. Someone who knows me better than I know myself and can help me make the right decisions

-It's important to stay humble and listen to colleagues and friends who see your faults

-Coaching is new to me but I can see the value in it

-Works well in keeping teams talking and looking for new solutions and ways around problems

- we've used it for the projects too which has been good in meetings to let everyone have a say

-we've done lots over the past year to keep the team connected over video calls. Happy hour Fridays, stupid quizzes, guess the baby pic competitions. All silly stuff but to keep morale up – coaching fits in well with that as it's about keeping us talking and listening

-some of the team thrive under minimal instruction while others struggle. I try to adjust my style for the individual

-time spent with l&d was all about listening more. It's hard to do when we've been conditioned to take charge but for some of the team it's really helped them solve things without me

- I don't want to be helicopter manager and it's just as well as the last year makes that pretty impossible

- the team are more independent and help each other more when they're used to working that way – it's not about being a great people person it's just about listening and asking the right questions

-undoubtedly there has been a wellbeing impact in the last year but IT have done really well on the whole

-it will be interesting to see how the dynamic changes when we're all in the same room again. The plan for IT is to work remotely for the foreseeable and I think we're well equipped to do that

-I'd like to do more social things in person as the work will be remote – team days would be good and although it always brings some eye rolls the team could do with feeding back and coaching each other more

-The barriers we've had have been overcome for the most part with remote working being one and actually that's worked out pretty well.

-Some of the team don't like the idea of coaching but all the managers get it so that's half the battle

- Luckily my manager wants to keep our team cross-functional and flat. He'll talk to anyone and want to hear their opinion so the egos are left at the door

- we have a few team members who are being mentored. Usually when they're new to the team it's a nice way to get them acclimatised

- with my own experience of having a mentor I think we could do more there to get people paired up who can help each other

EV7

Interview Notes:

Olli Mathias, Manager, Social Services (Children's) (PCC)

Monday 17th May 2021

- Mentoring comes very naturally to our team because of the supervisions we already have. Senior Social workers will supervise newly qualified social workers and that's a mentoring relationship. That's something we do throughout our careers in social work

- Coaching is something I'm practiced in but I think it is a learned behaviour. I definitely didn't get the kind of coaching I know about from my manager!

- We definitely don't have the whole team doing it but myself and my ATM are coaching when we can and it is helping the team be more independent which is important as we're busy.

- This is draining work and being able to share the burden and personal feelings is important.

- I know that improvement is important for the team and to feel like they're developing. Some times reflecting on your work is enough but sometimes we need to talk through next steps or next opportunities to pursue.

- We're all generally taught to listen and help people through situations so it just becomes something we do.

- Time together has been a barrier for us as we tend to think we don't have the contact time to talk as much as we would like as we already have a big case load

- Everyone gets it though so I don't think we struggle to implement the coaching. It's part of the job as I say.

EV8

Interview Notes:

Steve Lewis, Manager, Finance

Monday 17th May 2021

-I've had a mentor since I started in my job as accountant and developed to a manager position. They've always been someone in the role above mine so helping me to progress further

- We keep it professional really, sometimes they've helped identify things I could be working on or doing to develop but always work related conversations

- No we haven't looked at reverse mentoring. It's quite challenging in finance as each level becomes more knowledgeable and so it would be hard for someone junior to have an influence upwards. I do think there is room for us to get better at sharing ideas though

-Coaching is something we've talked about but haven't done too much of as it's hard to stop and have those sorts of conversations

-For me coaching means stopping everything and our service often runs too fast. This time of year could be a good time to do it as closure has finished but we always seem to be busy!

-Mentoring offers value as a teaching tool. Setting examples for how to be to junior staff and training opportunities.

-We wouldn't have grown as a service without some mentoring structure – especially during the last year when we haven't been able to be there as managers.

-Coaching could be helpful for managers to do. We aren't equipped with much to support staff on a personal level and this feels like the main purpose of coaching

-Mentoring is fairly organic and we don't tend to select mentors for staff unless they request specifically. There are bonds between teams and line managers will often look to support their teams anyway so mentoring happens anyway

-I suppose we do already manage in a coaching style. We get the teams up to speed and train them and address any concerns with them. We'll encourage them and feedback if things aren't going well.

-The main benefits are for the team to know who to go to if they need help. We all want to do a good job and will look to ask if there's areas we can improve on so having a support around you is important to us. Obviously with my own development to manager I can see the value in training and mentoring happening amongst the team as we'll grow our own managers.

- I think we could structure mentoring more effectively. Have people who are recognised as being good at training and mentoring so set them up as people to share knowledge. I'm not saying it's the wild west but some of our staff are better at mentoring than others

-I do think that the personal side of conversations will be difficult if we do what you propose. Accountants stereotypically want to focus on the numbers and aren't interested in the chat or non work related conversations. I think that people would be open to more support options though.

EV9

Interview Notes:

Russell Murray, Area Supervisor, Building Maintenance

Wednesday 19th May 2021

-We have training as an ongoing thing and it's often on a buddy system. That's especially how we've had to work during covid as everyone's in work bubbles so new staff are trained by older etc.

-I don't really have any mentoring myself. Peter [Manager] will meet with me but we often talk about the operation of the teams or team members themselves. We don't talk about me that often.

-Recently we've had to deal with a lot so having an opportunity to vent would be good. There's been a lot of mental health [issues] in the team and we aren't really equipped for that.

-Without mentoring or training our teams wouldn't know what they are doing. Don't get me wrong they learn a lot through the qualifications but a lot of the work is learned on site. It's important for getting teams to bond as well. We've tried to do formal training in a meeting room but for a lot of things experience is best.

-I try to coach our teams but it's hard when they're all out on site. There are some boys we don't see for weeks at a time and you only find out about issues down the road. I suppose that's the strength of the coaching we have already that they can cope without a manager always being there.

-Yes I'd always like to do more but I don't know when we'd do it or how it would fit in. The boys are usually good at talking about themselves when it comes to work – they don't always want to talk about their personal lives but if they get a sniff that someone is getting training that they're not they soon pipe up.

Learning

As a learning organisation, we encourage vision, innovation and creativity. People are engaged with continuous learning & development, they are empowered to be ambitious, trusted and are receptive to change.

As Employees we:

Seek and share best practice from internal and external sources, put forward and are receptive to creative and innovative ideas, suggestions and solutions.

Are proactive in seeking learning opportunities and take personal responsibility for continuous personal and professional development.

Practice self-reflection, thinking 'How can we do this better?'

Demonstrate a willingness to change, accepting and promoting new ideas, and are willing and able to challenge constructively.

As Managers we:

Empower and encourage staff to put forward their creative and innovative ideas. Enable an ongoing learning environment, creating opportunities and protected space that encourages development.

Allow and accept mistakes and provide constructive feedback in order to improve and develop.

Are open-minded to different ways of doing things, are prepared to be challenged, learn from mistakes and successes, listen to new ideas and seek to recognise and understand different perspectives.

Exhibit humility and self-awareness, actively seeking to understand staff needs.

As Senior Leaders we:

Identify experimental innovations for service delivery, challenge practice and empower people to deliver them, actively encouraging different ways of working.

Actively support and value learning & development and adopt a learn, share, apply and reflect approach in an environment where learning is valued.

Demonstrate trust and trustworthiness, equality and learning.

Effectively communicate in a clear, meaningful and positive way and challenge unhelpful practices.

Results

As a results focused organisation we strive to achieve excellence through working collaboratively, managing risks and resources and providing clarity of direction. People are inspired to take ownership and find solutions.

As Employees we:

Demonstrate proactive, productive participation in achieving individual, team and departmental goals.

Aim for excellence in the delivery of services, work with others to meet deadlines and standards to achieve better outcomes for people.

As Managers we:

Set positive challenges and achievable, realistic goals whilst communicating clear priorities.

Trust employees and empower them to make decisions, take managed risks and implement changes to achieve their targets.

Clearly communicate and role model what good practice looks like.

As Senior Leaders we:

Set an example and inspire those around them to achieve and strive for top performance.

Look ahead, plan for the long term and have a vision for their service. Formulate, understand and communicate clear and appropriate outcomes for their organisation.

Are accountable for the delivery of strategic aims and objectives of the authority by taking ownership of corporate initiatives, our services and their results.

EV11

Employee Services, HR Systems / People Analytics	• HR transactional 'lifecycle' • Payroll, Pensions, Staff Benefits • DBS, Right to Work • Recruitment • iTrent Maintenance/Development 'e-HR' • Business Reporting • People Analytics
Learning & Development	• Statutory and compliance related training • Bespoke learning and development interventions • Organisational development interventions • Leadership/Management Development • Digital learning i.e. e-Learning • Elected member development • Coaching and action learning
Health, Wellbeing, H&S	• H&S; Occupational Health; Wellbeing; Manual Handling

In 2019/20 there will be ongoing financial pressures on all services within the Council including HR. In order to deliver on the aspirations within this strategy careful considerations of the necessary levels of resources will be necessary. Innovative service delivery will be a prerequisite and HR may even require investment in resources to maximise its contribution to the wider change agenda within the Council.

Key Deliverables

In addition to 'business as usual' activities the table below outlines the key deliverables for the service 2019 – 2021. Greater detail is given in Appendix 1 which details includes Service Improvement Plan Actions:-

Action	During 2019/21 we will:
Deliver on the Council's transformational change programme to enable it to meet the future needs of citizens of PCC within the context of unprecedented financial challenges	• Continue to contribute to the delivery of organisational change and any HR implications that may arise as a result. • Lead the Culture Change Work Stream including continued engagement and consultation in the form of focus groups and further 'Moving Ahead Together' workshops and surveys; ensuring that employees continue to have a voice in shaping organisational change. • Contribute to the work to ensure budget savings are achieved. • Up-skilling managers and team members alike, and coaching teams to find ways of doing things differently. • Continue to explore collaborative working arrangements to share HR services with neighbouring organisations to maximise resources and increase service resilience
Align Service Workforce Planning & Development Plans in response to the Severance Scheme and ensuring staff have the necessary skills, training and support, incl. health and wellbeing support to adapt to the changes in how services are planned and delivered	• To embed SWITCH in hr process. • Support the development needs associated with the Council's Smarter Working Strategy. • Continue to refine the Leadership Development Framework. • Continue to build on the Time to Change Wales work and normalising the conversation around mental health. • Work toward Corporate Health Silver Standard. • Work with DWP and PSB partners to support the Disability Confident scheme. • Maximise the use of our Apprenticeship Scheme. • Review key employment policies. • Continue to review and enhance the Council's Succession Planning and Talent Management.

EV12



RE: Coaching and Mentoring update

Thanks Julie, that's really helpful.

I'll start having some conversations with managers in both areas. I'm not expecting to change the culture overnight but I think it would be realistic to help plan some structure into their mentoring setup as a first task.

I'll check in with you next month to see how it's been going.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Watkins, Julie <Julie.Watkins@pembrokeshire.gov.uk>
Sent: 24 May 2021 08:17
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Coaching and Mentoring update

Hi Duncan

That's good to hear that you have been able to have some conversations with managers in your areas. It is also interesting to hear how the areas who haven't embraced coaching are seeing higher

absence numbers. It goes to show it can be helpful!

I am aware of two areas you have identified as needing support. Long term these will be a focus for our team of coaches but this may not happen in the time frame you are working within. There is nothing to stop you working on a smaller scale if you wanted to start raising awareness. Especially as it is pertinent to your role.

Please find attached the following which could be helpful when having those conversations:

- Coaching Application Form
- What is coaching?
- Role Profile for PCC Coaches
- Coaching Process Flowchart
- Reflective Practice Proforma

Below are some links I mentioned.

[Global Code of Ethics](#)
[Competency Framework](#)
[7 Eyed Supervision Model](#)

Let me know if you need anything else or if you have any more questions

Regards/Cofion

Julie Watkins

Learning & Organisational Development Advisor
Pembrokeshire County Council
Pembrokeshire Archive
Prendergast
Haverfordwest
Pembrokeshire
SA61 2PE

Tel: **01437 776419**

Julie Watkins

Ymgynghorydd Dysgu A Datblygu Sefydliadol
Archifdy Sir Benfro ac Astudiaethau Lleol
Prendergast
Hwlfordd
Sir Benfro
SA61 2PE

Rhif ffôn: **01437 776419**



From: Hook, Duncan

Sent: 21 May 2021 08:43

To: Watkins, Julie <Julie.Watkins@pembrokeshire.gov.uk>

Subject: Coaching and Mentoring update

Hi Julie, I hope you're well.

Thank you again for the time you spent with Sharon and me earlier this month looking at coaching and mentoring already in place within PCC.

Following your advice regarding having an impact, I briefly interviewed a few managers from areas you had identified as showcasing coaching skills already and some of those that weren't. I am the HR support for IT, Children's services, Building Maintenance and Finance so this is mutually beneficial to offer support long term.

I've attached a summary of my main findings from these interviews.

I would like to do some work with Finance and Building maintenance as many of the issues I've been seeing in mental wellbeing and performance/capability have been present in these teams so it would help me in my role. Perhaps I could also sit in on a meeting with managers there if you have one?

Let me know your thoughts on what is possible.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser
Human Resources

Coaching and Mentoring at PCC	
<i>These are the main findings from a series of interviews with managers in various service areas and my own interactions over the last 12 months regarding the perception, benefits and blockers to the implementation of coaching and mentoring.</i>	
Perception	
• While <u>mentoring is understood and valued</u> across all areas, it is not always implemented well. These are invariably casual relationships formed by chance and utilised for career progression or learning the role without many examples of formal structure. • In more operational roles, <u>mentoring is often utilised as a training tool</u> and the mentor relationship drops off after the mentee has learned the role or got the promotion. • While <u>some teams are starting to build a coaching culture</u>, others are seemingly unaware of what coaching is and the benefits it offers to their teams. In conversations with Building Maintenance (BM) and Finance • Teams within Social Services find the idea of coaching easier. It is already closer to the way that they work but there is <u>potential for the coach to become more counsellor than coach</u> in this area as many Social Workers are dealing with difficult cases. • Teams with flatter structure find coaching easier to introduce. There is already a culture of feedback and collaboration in place so coaching complements this.	
Benefits	
• <u>Improved team morale</u> has been felt in teams who have embraced coaching. Particularly during the lockdown/work from home order. • <u>Autonomy</u> amongst staff to complete their work remotely without manager intervention. • <u>Problem Solving</u> has been more effective and more collaborative in	
Blockers	
• <u>Lack of time</u> given as the biggest reason for not coaching. Seen as a long-term solution but there isn't the time to stop right now to coach or be coached. • <u>Lack of knowledge</u> admitted by some managers. They would not feel confident coaching, as they do not know what is expected of them. • <u>General attitude amongst the team on coaching</u> a problem. Managers do not feel that some staff would take up coaching, as it is not direct coaching so feels like it lacks value.	

Impact	
• High numbers of <u>Sickness absence</u> relating to mental health across BM and Finance (last 12 months). 6x Long Term absence, 4x Short Term absence across 23 instances. • 3x <u>grievances</u> heard in BM and Finance regarding recruitment practice favouring external candidates and not developing internal talent. • Teams are stretched further than before. Finance have had to ask for extensions to deadlines for the last three years, which would suggest a lack of focus and efficiency within the team.	
Recommendations	
• L&D to consider factoring in BM and Finance when introducing the next wave of coaches. • Managers in BM and Finance recommended to have coaching sessions to understand the value of coaching so they can pass this knowledge onto their teams • Introducing structure to the already understood and valued mentoring taking place. Looking at starting relationships which will be long lasting and valuable to both parties • L&D to assess the situation of coaching in Social Services. Is it understood or is there a danger that these coaching sessions become therapeutic rather than developmental.	



Section A – Applicant Details

Full Name	Contact No.
Job Title	
Work Location	
Email Address	
Employee No.	Are you a manager or supervisor? ☐ Yes ☐ No ☐

What are you hoping to achieve from the coaching?

Specifically, what do you do well in your role?

How will you know when you've achieved your desired outcomes? How will you measure success?

Section B – Manager Details

Name	Contact No.
Email Address	

What's currently happening that requires this individual to receive coaching?



What is it about this person that makes it worth investing in them?

What specific measures of success are you willing to accept that will show that coaching this person has provided acceptable ROI to the organisation? Please include 2 clear, specific, observable measures.

Which aspects of the above have you already discussed with this person? If discussion is not yet complete, when will the remainder take place?

Section C – Authorisation

By authorising this application, you are agreeing to:

- Allow the time to attend coaching sessions
- Support your team member through the process and help them to apply their learning in the work place.

Coachee Date

Line Manager Date

Please return completed application form to:
Learning and Development, Pembrokeshire Archives, Pendregrast, Haverfordwest, SA61 2PE
Email: julie.watkins@pembrokeshire.gov.uk

All information that we hold concerning you as an individual will be retained and processed by Pembrokeshire County Council Learning and Development, strictly in accordance with the provisions of the General Data Protection Regulation 2016, as set out in our Privacy Notice. A full version of this notice can be viewed on the SCWDP Website within the Pembrokeshire County Council website. Alternatively, a paper copy can be provided on request at courseapplications@pembrokeshire.gov.uk

Coaching 5



Learning and Development

What is coaching?

Association
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Coaching is...

- One to one
- Confidential
- Over a period of time
- Separate from the frantic activity of everyday work
- Stopping the clock
- Reflecting on what you're doing
- Reflecting on the impact you're having



Your coach is...

- Skilled and trained
- Impartial
- Listening
- Asking thought provoking questions
- Facilitating development discussions
- Interested in you

Coaching can help you to:

- Deal with transition and change
- Build leadership/management skills
- Improve personal effectiveness
- Develop skills and raise self awareness
- Resolve conflict and disputes
- Undertake challenging projects and assignments
- Gain a more strategic perspective after promotion to a more senior role
- Prepare for future roles.

What is Coaching?

The term "coaching" means different things to different people. A simple definition is 'working with people to unlock their potential through guidance and questioning rather than by training or instruction'.

Coaching helps to build self-reliance and confidence so that the coachee has the ability to successfully address challenges. The coach is not there to provide answers, to solve problems, or to teach or instruct. The coach is a facilitator, a sounding board, an awareness raiser.

How Does Coaching Work?

Coaching is a unique, confidential relationship between coach and coachee. A coaching session allows individuals to talk freely about their performance; the issues/challenges they are facing and how they might address them; how they think others perceive them and any workplace insecurities. Coaching allows them to investigate how these factors impact on their work performance and relationships.

Rapport will need to be established between the coach and coachee so that the coachee feels comfortable and able to talk. The coach will listen and ask questions in order to fully understand the coachee's issue. Coaches are also skilled in reading non verbal body language and will pick up on this unspoken dialogue.

How Can Coaching Make a Difference?

Coaching can be highly effective at all levels in the organisation. Reorganisations, mergers and restructures can cause enormous unrest and low morale for teams. Coaching can be a useful intervention for manager to support them in refocusing and helping to motivate staff through periods of uncertainty.

Coaching can also help individuals move you forward to achieve specific goals within their current role, deal with particularly challenging issues and relationships, develop new skills or reinforce learning from more conventional training programmes.

Many people find coaching particularly helpful when they have recently secured a promotion, as they explore their new role, develop different approaches and forge new relationships.

One of the key prerequisites for successful coaching is that the coachee is totally committed to making change happen.

Who can benefit from coaching?

Anyone who wants to improve the way they perform **their role and who wants to make the most of their potential.**

How does the process work?

A flow chart showing the process can be found overleaf.

Application

Though some coachees may approach Learning and Development directly for coaching, coachees will be encouraged to involve their line managers in the process. Coachees will be asked to complete an application form that requires both them and their line manager to identify development needs.

Contracting

Once the line manager, coach and coachee have identified goals and outcomes these are built into a **contract** which can be referred back to and reviewed as part of the coaching relationship. Establishing this three way contract ensures that the potential benefits of coaching are maximised for both the coachee and the Authority.

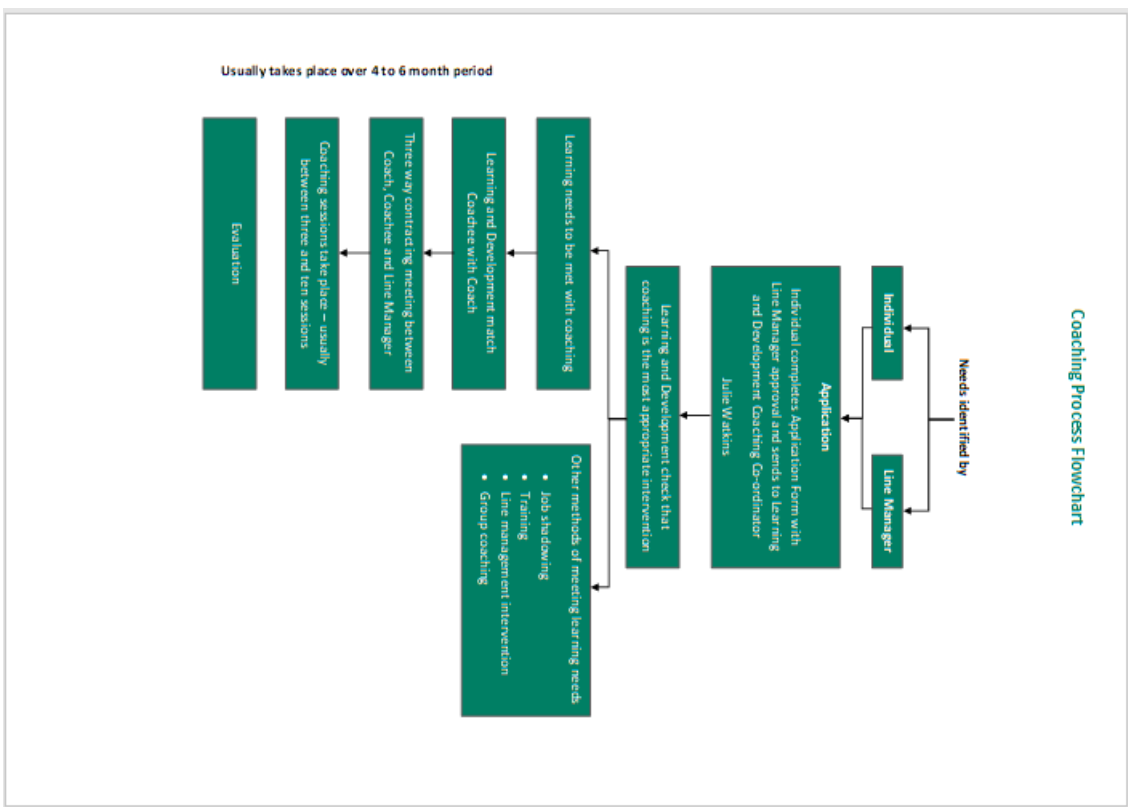
Meeting Frequency, Duration and Venue

Each coaching relationship will usually start with an introductory meeting. This ensures that the coach and coachee are able to work together and provides an opportunity for the coachee to ask any answers they have about the coaching process. The introductory meeting will be used to draw up the contract including the number and frequency of future coaching sessions. The timings and venues of future meetings will be agreed at this stage. Coaches can meet coachees at their workplace if a private room is available and it can be guaranteed that the coachee will not be interrupted.

The Role of Line Management

Whilst coaching is being **undertaken**, the line manager should be providing support to the coachee.

EV16



EV17



Being a PCC Coach – Role Profile



What is coaching? At its simplest, coaching is a one-to-one relationship in which the coach enables the coachee to identify, focus on, and achieve their goals. The International Coach Federation [ICF] defines coaching as <i>‘partnering with clients in a thought-provoking and creative process that inspires them to maximise their personal and professional potential’</i>. You can find out more about coaching here.
What does a coach do? In a 1:1 setting, through a series of conversations, the coach supports the coachee to explore their vision or goals, their current situation and the changes they want to make, the actions they want to take to make the changes, and their experience and learning from those actions. In tackling these areas, the coach will also enable the coachee to be more aware of him/herself and their impact on others, increase their sense of personal power and responsibility and assist them in developing strategies and techniques for future use, enabling long-term sustainable change. A coach works from the principle that the coachee has all the resources they need to resolve their own situation. They are not there to offer advice and in fact, may have very little or no knowledge about the coachee's area of work. They will, however, be skilled in the art of facilitating the coachee's thinking process through use of careful questioning and also various tools and models.
What is the PCC Coaching Network? The PCC Coaching Network has been created to provide a pool of qualified coaches to meet the coaching needs of the organisation. As we move towards our preferred culture of Purpose, Learning and Results, coaching will play an integral part of supporting our managers to develop and make the necessary behavioural changes that will underpin the culture.
What will my responsibilities be as a coach in the PCC Coaching Network? You will be expected to: - Attend 7 full day workshops. (100% attendance is a requirement of the accreditation process). - Successfully complete 3 assignments within agreed timescales, leading to achievement of the LMA LS Certificate in Coaching & Mentoring. <i>Please note these will need to be completed outside of the allocated workshop time.</i> - Become an active member of the PCC Coaching Network, undertaking a minimum of 18 hours coaching per year, ideally with a minimum of two coachees. You will also need to put aside time for preparation work, travel time and follow-up activities as appropriate. <i>Please note that you will need your manager's support to undertake coaching activity during working hours.</i> - Act according to the Global Code of Ethics. - Receive supervision as appropriate for coaching activity undertaken. - Undertake on-going CPD both individually and as a member of the PCC Coaching Network. - Provide feedback and be actively involved in the evaluation of coaching.



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Learning and Development

Reflective Practice Pro Forma

Name	Date	Session
How was I before the session?		
A summary of the client's issues		
What worked during this session? How did you identify this?		
What didn't work – or worked less well? How did you identify this?		
What were the challenges for me?		
What techniques and approaches did I draw on, with some reflections on why you chose them, rather than alternatives?		
Your feelings as the session went on?		
Any moments when I didn't stay focused?		
What have you learnt about coaching as a result of the session?		
What the client's feedback was		
What ideas do you have for the next session?		
What specifically are you going to do differently next time?		

EV19

	Subject	FW: Coaching and Mentoring in Finance
Send	Location	Microsoft Teams Meeting
	When	26 May 2021 16:00-17:00
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan

Sent: 24 May 2021 09:57

To: Philpin, Dean; Lewis, Stephen (Finance)

Subject: Coaching and Mentoring in Finance

When: 26 May 2021 16:00-17:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi both, I hope you're well.

Following my meeting with Steve earlier this month regarding Coaching and Mentoring I have liaised with Learning and Development to look at ways they can support this implementation going forward. I would also like to work with you on this as I believe introducing coaching would have an impact on both morale and reducing absence.

Would you be free on Wednesday this week to talk through some of my recommendations? I appreciate you are very busy so happy to be flexible. We may not need the whole hour but thought we may be able to come up with some actions with a bit more time.

Thanks for your help,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

EV20



RE: Follow up: Coaching and Mentoring in Finance

Thanks Duncan. Yes great to talk through it and thank you for your assistance.

I will speak to Julie about the coaching sessions.

Steve

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 26 May 2021 17:16

To: Lewis, Stephen (Finance) <Stephen.Lewis@pembrokeshire.gov.uk>; Philpin, Dean <Dean.Philpin@pembrokeshire.gov.uk>

Subject: Follow up: Coaching and Mentoring in Finance

Hi both,

Thank you again for this afternoon's meeting. I wanted to follow up with a summary of what we discussed.

After discussing the current situation we summarised that:

- Mentoring is already in place and understood but there is no formal structure and the mentoring relationships are often circumstantial rather than being tailored to individuals.
- Mentoring only goes one way currently and there isn't much appetite for reverse mentoring amongst the finance team. You don't currently feel this would work but are prepared to work towards this – especially as you start to hire younger staff who could bring something to more tenured accountants.
- Coaching as explained in the meeting (and in the attached 'What is Coaching' document) is not currently utilised in the finance team but you understand the benefits.

When discussing barriers/blocks to introducing coaching or a new mentoring structure as well as possible solutions:

- There are already mentoring relationships in place and you wouldn't want to disrupt these – we agreed to start with staff who are

- either not in mentoring relationships already or have expressed desire for development.
- b) Coaching will take time to implement and we don't have the time - this is a long term plan but is in line with the Authority's new behaviour standard and cultural transformation. You shouldn't expect overnight change.
- c) Attitude of some staff towards coaching – starting with leadership will be the start and we aim for the influence to spread out from there.

I talked through some action points and recommendations for Finance:

- a) Work to support the mentoring strategy by pairing staff for long term relationships which will be mutually beneficial. I have agreed to work on some potential pathways for staff to support the development of skills and hopefully lead to pairing of mentors.
- b) Managers to start having coaching sessions to see the value from this process. Steve you have agreed to sign up to this as you are keen to see the value yourself. I have attached the coaching application form for you to complete and send to Julie Watkins. Long term we can plan for the line managers to have the same coaching and we will hope to see them become advocates for coaching.

Thank you again for a really productive meeting. Please take a look through the documents attached which I explained give a bit more context for you. I will start working on the finance pathways and hope to hear from you soon on your coaching application.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest

EV21



RE: Interview feedback

Thanks Duncan I really appreciate it.

Feeling much better after the session today and up for meeting later in May.

Kind Regards/ Cofion Cynnes

Tracy



Tracy Robinson
Senior Accounting Technician | Uwch Technegydd Cyfrifeg
Capital and Treasury / Cyfalaf a Trysorlys
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SA61 1TP
Tel | Ffon: 01437 775302
Email | E-bost: tracy.robinson@pembrokeshire.gov.uk

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 13 May 2021 14:40
To: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Subject: RE: Interview feedback

Hi Tracy, it was good to see you this afternoon to go through feedback.

I would like to follow up with the request you had for development. Steve has committed to finding a suitable mentor for you and addressing any knowledge gaps you have identified.

I will be assisting the Finance directorate with structuring a mentor programme but with Steve's blessing I would like to get some time with you later in the month to better understand your motivations. I believe that better understanding your needs will help formulate this plan for the wider team's development while also helping you reach your career goals.

I'll be in touch later this month to arrange a meeting on Teams with you if you are open to this.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
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Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 10 May 2021 09:04
To: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Subject: RE: Interview feedback

My apologies Tracy for not initially addressing your query.

I'm afraid it is not standard for us to share scoring across the Authority and we are unable to do so in this instance to avoid setting any precedent. I also believe that scoring without the context of the feedback will not be helpful to you.

Please be reassured that Dean and Steve have feedback for all your interview responses and will answer any questions or concerns you may have.

I'll see you on Thursday.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Sent: 10 May 2021 08:23
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Interview feedback

Thank you for your response Duncan.

Can you please share my scoring sheets so I can prepare for this feedback meeting?

Kind Regards/ Cofion Cynnes

Tracy



Tracy Robinson
Senior Accounting Technician | Uwch Technegydd Cyfrifeg
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SA61 1TP
Tel | Ffon: 01437 775302
Email | E-bost: tracy.robinson@pembrokeshire.gov.uk

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 10 May 2021 08:16

To: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>

Subject: RE: Interview feedback

Good morning Tracy, thanks for your email.

Yes I will be in attendance for this feedback session.

I will see you on Thursday.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

From: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>

Sent: 10 May 2021 07:45

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: Interview feedback

Good morning Duncan

On 5th and 22nd March 2021 you were part of an interview panel for two Senior Accountant positions.

I was informed on 24th March that my application had been unsuccessful. An interview feedback meeting has been arranged for Thursday 13th May at 1:30pm. Could you confirm that you will be attending please.

Could I also request access to my scoring sheets for both interviews please.

Kind Regards/ Cofion Cynnes

Tracy



Tracy Robinson
Senior Accounting Technician | Uwch Technegydd Cyfrifeg
Capital and Treasury / Cyfalaf a Trysorlys
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EV22

	Subject	FW: Finance Mentoring and Development
Send	Location	Microsoft Teams Meeting
	When	07 June 2021 15:00-16:00
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan

Sent: 27 May 2021 08:39

To: Robinson, Tracy

Subject: Finance Mentoring and Development

When: 07 June 2021 15:00-16:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Good morning Tracy, I hope you're well.

As discussed earlier this month I am requesting a meeting to chat about your goals for development.

I'm on holiday next week so this will be the week after. I hope the date and time above will be ok for you.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

Haverfordwest

SA61 1TP

Duncan.Hook@pembrokeshire.gov.uk

EV23



RE: My development meeting

Morning Tracy, thanks for this response.

I'm so pleased that you found the session useful and found some next steps that perhaps you weren't expecting.

There is still work going on in the background to set up mentors for all the team and I have already discussed that you are keen get involved once this starts.

I'll aim to get in touch later this month to see how you're getting on.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Sent: 7 June 2021 16:04
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: My development meeting

Hi Duncan

I again wanted to thank you for the meeting this afternoon. I appreciated you taking the time to discuss my goals and look at what was in my way to meeting them. Along with the feedback from Steve and Dean I think I have a lot to think about in respect to my own character and how I deal with different situations. From all the other times I've applied for this job I've never considered the human skills and always focussed on the knowledge of the job which is why I did better at the first stage interview.

I've got the full job spec so I'm going to take some to look through it and make notes on what I need to be focussing. Fingers crossed it helps!

Kind Regards/ Cofion Cynnes

Tracy



Tracy Robinson
Senior Accounting Technician | Uwch Technegydd Cyfrifeg
Capital and Treasury / Cyfalaf a Trysorlys
Pembrokeshire County Council | Cyngor Sir Penfro
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SA61 1TP
Tel: 01432 375000

EV24

	Subject	FW: Coaching and Mentoring in Building Maintenance
Send	Location	Microsoft Teams Meeting
	When	27 May 2021 10:30-11:30
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan

Sent: 24 May 2021 10:17

To: Marchant, Phil (Maintenance); Murray, Russell

Subject: Coaching and Mentoring in Building Maintenance

When: 27 May 2021 10:30-11:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi both, I hope you're well.

Following my meeting with Russell earlier this month regarding Coaching and Mentoring I have liaised with Learning and Development to look at ways they can support this implementation going forward. I would also like to work with you on this as I believe introducing coaching would have an impact on both morale and reducing absence.

Would you be free on Thursday this week to talk through some of my recommendations? I appreciate you are very busy so happy to be flexible. We may not need the whole hour but thought we may be able to come up with some actions with a bit more time.

Thanks for your help,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

Haverfordwest

EV25



RE: Follow up: Coaching and Mentoring in Building Maintenance

Thanks Dunc

Will try to have a look at this after half term.

Russell Murray

Arweinydd Prosiect / Project Leader

01437 775962

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 27 May 2021 16:38

To: Murray, Russell <Russel.Murray@pembrokeshire.gov.uk>

Cc: Marchant, Phil (Maintenance) <Phil.Marchant@pembrokeshire.gov.uk>

Subject: Follow up: Coaching and Mentoring in Building Maintenance

Hi Russell,

Thank you again for this morning's meeting. I've coped Phil in as he was unable to make it but I hope he will be involved going forward. I wanted to follow up with a summary of what we discussed.

After discussing the current situation we summarised that:

- Mentoring is currently used throughout BM but is mainly used as a training technique. This isn't about long term career development in the majority of cases and is more about learning and overcoming obstacles in the moment.
- Coaching is not used currently.

When discussing barriers/blocks to introducing coaching or a new mentoring structure:

- Lack of understanding towards coaching style (have attached a document that may help explain beyond our conversation today)
- Not clear on whether coaching will be beneficial/worth the time investment

I talked through some action points and recommendations for Building Maintenance:

- As mentoring is already accepted by the team, look to make this as effective as possible – take note of who is mentoring currently and understood effectiveness. Performance review potential time to gather this information.
- It isn't clear whether coaching will have be of benefit – I have suggested that Russell takes part in a Coaching session to see the benefit for himself and whether this could work for other supervisors/team leaders (application form attached).

Thanks again for meeting with me this morning. I hope that after you've had some experience with coaching you will see the value in it for your teams and I'll get back in touch in a few weeks when you've met with Julie Watkins to see if you've considered getting on board with the coaching programme.

Kind regards,
Duncan

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EV26

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Job Title	Role Profile	Grade	Job Description	Qualifications	Knowledge	Experience	Soft Skills/Competencies	Current Post Holders	C+ZED current data (change since stage 2 unless it is icable)	KNOWLEDGE ROW	KNOWLEDGE COL	SKILLS	K VALUE	IMPACT ROW		
Finance Manager	BS7S	12	 C:\Users\11947\Downloads\Finance Manager JD (1).doc	Fully qualified Accountant (CCAB, CIMA or overseas equivalent)	Relevant knowledge of current developments affecting local government.	Five years post qualification experience favourable	Leadership	2								
				Evidence of Continuing Professional Development	Detailed knowledge of local government accounting conventions and the regulatory environment	Substantial experience of working in a large public sector organisation	Motivating Others	Delivering to strict deadlines								
				Recognised managerial qualification or equivalent qualification favourable	Up-to-date knowledge of current developments affecting accounting practice	Relevant Senior Level Experience	Interpersonal skills									
					A clear vision of the contribution that exceptional financial management makes to organisational success.	Substantial experience (at least ten years) of financial management in the public sector	Written Communication									
					Proven experience of Change Management	Exposure to major budget challenges and value for money requirements	Spoken Communication									
					Be able to advise on appropriate action to mitigate risk and/or realise benefits.	Operational management of major accounting functions.	Presentation skills									
					Ability to provide specialist advice and influence outcomes.	Substantial experience managing a finance/accountancy team in a public sector organisation of comparable size and complexity.	Innovation									
							Problem Solving									
							Influencing									
		</														

Senior Accountant	BS4S	8	 C:\Users\1159417\Downloads\Senior Accountant JD (1)	Part professional qualification above Accounting Technician standard with a body recognised by the CCAB, CIMA or overseas equivalent with continuing professional and managerial training towards full qualification desirable.	Detailed knowledge of budgets of the service areas for which the post-holder is responsible The Council's Financial Management, Creditors, Payroll and other systems providing information to clients Knowledge of existing and proposed legislation as it affects the finances of the services area for which the post-holder is responsible Detailed knowledge of the Council's financial regulations Detailed knowledge of control procedures operating within the Council and within the specific service area Detailed knowledge of the budget and final account policies and procedures of relevant service area Spreadsheets, databases and other technical tools used for the analysis and summarisation of financial data. Ability to provide specialist advice and guidance.	Proven experience in an accountancy related post following qualification to Accounting Technician level Preparation of financial control information for senior management Involvement in final accounts work	Working under pressure Working to deadlines Working independently Problem solving Written Communication Spoken Communication Presentation skills	15	BS	4	5
Senior Accounting Tech	BS3S	7	 C:\Users\1159417\Downloads\Senior Accounting	Accounting Technician level or equivalent	Financial ledger, creditors, debtors and cash receipting and management systems Budgeting principles and reconciliation routines HMRC legislation Corporate procedures relating to grant funding Council's underlying funding assumptions. Advanced use of spreadsheets and other tools used for analysis and summarisation of financial data.	Minimum of 3 years experience in a financial services related post with experience preferably including Payroll and Creditor compliance.	Working under pressure Working to deadlines Problem Solving Interpersonal Skills Written Communication Spoken Communication	5	BS	4	4
Service Charge Officer	BS3S	7	 C:\Users\1159417\Downloads\HOLDS Service Charge	Degree, HNC or equivalent qualification	IT literate and proficient in use of regularly used ICT systems, spreadsheets and databases Demonstrate ability to understand and manage budgets / financial schedules Demonstrate ability to understand and translate into effective practice relevant legislation and statutory obligations in relation to this area of work. Understanding of welfare benefit system and financial inclusion in relation to service chargeable items	Relevant experience in a housing, financial or business related role	Working under pressure Working to deadlines Interpersonal Skills Working independently Organisation skills Priority Setting Written Communication Spoken Communication	1			
Grant Funding Admin	BS3S	7	 C:\Users\1159417\Downloads\Grant Funding Admin	Qualified to Accounting Technician level of equivalent	Financial ledger, creditors, debtors and cash receipting and management systems Advanced use of Excel spreadsheets and access databases Terms and conditions applying to the various grants Budgeting principles and reconciliation routines An awareness of VAT issues as they affect grant funded schemes and projects The corporate procedures relating to grant funding Council's underlying funding assumptions.	Proven experience in a financial services related post with experience preferably including completing grant funding applications and claims	Working under pressure Working to deadlines Working independently Problem Solving Interpersonal Skills Written Communication Spoken Communication	5			
Accounting Technician	BS3A	6	 C:\Users\1159417\Downloads\Accounting	Part-qualified Accounting Technician level or equivalent, working towards full qualification.	budgeting principles Financial controls and procedures operating within the Council generally and within the specific service areas for which responsibility is assigned Reconciliation routines Council's financial coding system Council's Financial Management, Creditors, Payroll and other system providing information to clients. Keyboard skills and a working knowledge of spreadsheets and other tools used for analysis financial data	1 to 2 years experience working within an accountancy environment involved with financial and management accounting issues. Optimising new technologies/software	Organisation skills Priority Setting Using initiative Working under pressure Working to deadlines Written Communication Spoken Communication	15			

EV27

Send	Subject	FW: Mentoring Structure Finance
	Location	Microsoft Teams Meeting
	When	10 June 2021 16:00-17:00
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan

Sent: 07 June 2021 09:53

To: Lewis, Stephen (Finance); Philpin, Dean

Subject: Mentoring Structure Finance

When: 10 June 2021 16:00-17:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi both, I hope you had a good half term break.

I've put some work into the background work you requested before we look into a mentoring structure for Finance. Would it be possible to meet this week to discuss next steps?

I hope the time above works for you both.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

Haverfordwest

SA61 1TP

EV28

 Finance Pathways

 Finance Role Comparison.xlsx
137 KB

From: Hook, Duncan

Sent: 9 June 2021 16:25

To: Lewis, Stephen (Finance) <Stephen.Lewis@pembrokeshire.gov.uk>; Philpin, Dean <Dean.Philpin@pembrokeshire.gov.uk>

Subject: Finance Pathways

Hi both, I hope this finds you well.

Ahead of our meeting tomorrow I wanted to share the Pathways preparation I have made so far as we will be discussing this as part of preparing to bring some structure to mentoring.

This 'Role Comparison' document outlines all the major roles within Accounts up to Finance Manager and outlines the skills, qualifications and experience required for each level. This is all pulled from the role profiles and person spec for each job. I have started to highlight the major jumps in skillset in red.

If you have any queries on what I've sent you please let me know.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser

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County Hall

Haverfordwest

EV29



RE: Mentoring Structure Meeting

Yes thanks for yesterdays meeting Duncan.

I think we're both excited to see where this goes over the upcoming months.

Best wishes
Dean

Dean Philpin
Finance Manager – Education & Schools / Development
Pembrokeshire County Council
County Hall / Neuadd Y Sir
Haverfordwest / Hwlfordd
Pembrokeshire / Sir Penfro
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Stay Safe 

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 10 June 2021 17:42
To: Lewis, Stephen (Finance) <Stephen.Lewis@pembrokeshire.gov.uk>; Philpin, Dean <Dean.Philpin@pembrokeshire.gov.uk>
Subject: Mentoring Structure Meeting

Hi both,

Thanks again for another productive meeting. I've attached some rough minutes I took of what we discussed (attached).

I'm excited to see how these new mentoring relationships work out and I hope you'll see the benefit of creating these longer term relationships amongst your team.

I'm pleased to see you've already started to work out these pairings and I'll be in touch in a couple of weeks to see how this goes.

Thanks again,
Duncan

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EV30

Finance Mentoring Structure

Meeting Notes

10/06/2021

Mentoring Purpose

- Creating long term working relationships
- Helping the mentee excel in their career/life
- Sharing knowledge
- Working together to develop skills
- Mutually beneficial relationship. Mentor/mentee both learning from the experience
- Improving self awareness

Benefit to Finance Department

- Growing our own talent within PCC
- Better working relationships between team members
- Help extend manager reach
- Helping to flatten structure in department
- In the long term, reverse mentoring could help flatten structure
- Help lay groundwork to bringing in a coaching culture

Finance Pathways & Mentoring

- Bringing clarity for staff to see how they need to develop to get to their career goal
- Looking at all aspects of the role from experience, qualifications, competencies
- Certain soft skills are introduced as milestones to the Senior Accounting technician role but are everyday practice for Principal Accountant and so creating these pairings could be helpful in developing
- Development of nurturing skills in line managers
- Focussing on staff who want to develop first. Not a punitive measure. This is about building positive relationships
- This is not intended as a training experience. Mentees will learn but from experiences rather than being told what they should do

Next Steps

- S&D committed to introducing more structured mentor pairings.
- 3-5 pairings as a target for this quarter
- Using Performance Reviews as a launch pad with staff involved
- Tracy Robinson and Jody Tilling priority as potential from their interviews for Senior and Principal accountants. Are there other recent applicants for jobs who would find this beneficial?
- Selecting the right people as mentors – training available on POD or from L&D – we may need to rely on digital currently.

How will we evaluate/measure success

- Review with Mentor and Mentee at a 1 month, 3 Month and 6 Month period (*Not looking at personal information – looking at whether the pairing is working well*)
 - What has been their experience so far?
 - Are they meeting regularly? What is the ideal cadence for meeting?
 - Are they sticking to this as a mentoring experience and not training?
 - How is the relationship developing?
 - Are additional resources required? Training? Time?
- Long term - review the progress of mentees career development
- Long term - measuring the numbers of internal applicants/success at interview/retention of staff
- Long term - measuring impact on sickness absence/wellbeing
- Long term – development of more mentors

EV31

 Send	Subject	FW: Coaching and Mentoring update
	Location	Microsoft Teams Meeting
	When	25 June 2021 09:00-09:30
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan

Sent: 24 June 2021 14:42

To: Lewis, Stephen (Finance)

Subject: Coaching and Mentoring update

When: 25 June 2021 09:00-09:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Thanks Steve,

Look forward to catching up.

Kind regards,
Duncan

Duncan Hook
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Microsoft Teams meeting

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From: Lewis, Stephen (Finance) <Stephen_Lewis@pembrokeshire.gov.uk>
Sent: 24 June 2021 14:37
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Coaching and Mentoring update

Hi Duncan

Yes all going well so plenty to update you on.

I have some time first thing tomorrow if you are available then?

Steve

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 24 June 2021 13:12
To: Lewis, Stephen (Finance) <Stephen_Lewis@pembrokeshire.gov.uk>;
Subject: Coaching and Mentoring update

Good afternoon Steve, I hope you're well.

It's been a couple of weeks since we last spoke and I heard from Julie that things have really progressed on the C&M front.

I understand that you have experienced a coaching session already with Julie and you have started to set up the mentors in Finance.

I know you're busy but I wondered how this was all going and hope you might have some time to catch up. Let me know.

Kind regards,
Duncan

Duncan Hook
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EV32

 RE: Coaching and Mentoring Finance

Cheers Duncan

Happy to meet in a month. Have some holiday at the end of July but happy to meet early August as things should be a bit quieter!

Steve

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 25 June 2021 10:49
To: Lewis, Stephen (Finance) <Stephen_Lewis@pembrokeshire.gov.uk>
Subject: Coaching and Mentoring Finance

Hi Steve, thanks for our meeting this morning.

Great to hear that you have worked out two mentoring relationships so far and set them up with training and they're very positive about it. As you have agreed I would like to meet with one of the mentors, probably Vicky to get an idea on how she's feeling about this. I'll also check in with Tracy as I have already met with her previously and it would be good to get an update now she has Bex as a mentor.

Great to hear how your taster coaching session with Julie went and that you're considering working with an external coach after this. I'm glad she took the time to go through a potential coaching rollout plan with you. Also fantastic idea suggesting to Dean that he has a taster coaching session as well and we'll see how that goes for him.

As discussed, let's plan to meet in a month's time with Dean to review the progress of mentoring so far and see how he's feeling about coaching after a session. As we discussed this is a long term plan and I wanted you to see the value first.

Thanks again,
Duncan

Duncan Hook
Employee Relations Adviser

EV33

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 17 June 2021 11:24
To: Murray, Russell <Russel.Murray@pembrokeshire.gov.uk>
Subject: Coaching and Mentoring update

Hi Russell, I hope you're well.

As it's been a few weeks since we last spoke about coaching and mentoring I wondered if you've had a chance to request a coaching session or look at mentoring within maintenance. I know it's been a busy few weeks for your team so understand that big change may not be possible but it would be good to understand how you're feeling about the potential of these initiatives.

Would you have some time in the coming week to meet to catch up on this?

I'm also happy to support if you had any questions about mentoring and coaching after our last meeting.

Kind regards,
Duncan

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EV34

	When	29 June 2021 11:00-11:30
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan
Sent: 25 June 2021 15:56
To: Robinson, Tracy
Subject: Mentoring Catch up
When: 29 June 2021 11:00-11:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.
Where: Microsoft Teams Meeting

Thanks Tracy, yes 11am on Tuesday would be great.

Look forward to hearing how it's all going.

Kind regards,
Duncan

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From: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Sent: 25 June 2021 15:38
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Mentoring Catch up

Afternoon Duncan. I'm good thanks how are you?

Yes I have time on Tuesday morning if you can meet? 11?

Kind Regards/ Cofion Cynnes

Tracy



Tracy Robinson
Senior Accounting Technician | Uwch Technegydd Cyfrifeg
Capital and Treasury / Cyfalaf a Trysorlys
Pembrokeshire County Council | Cyngor Sir Penfro
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Email | E-bost: tracy.robinson@pembrokeshire.gov.uk

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 25 June 2021 15:29
To: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Subject: Mentoring Catch up

Hi Tracy, how are you?

It's been a couple of weeks since we last met and I understand that things have progressed with mentoring since then.

It would be great to catch up next week if you've got some spare time? Your calendar looks chocka so I'm not sure if you have any time spare.

Thanks,
Duncan

EV35



RE: Mentoring Catch up

Thanks again Duncan

Yes happy to catch up again about this in a few months.

Kind Regards/ Cofion Cynnes

Tracy



Tracy Robinson
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From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 29 June 2021 11:51
To: Robinson, Tracy <tracy.robinson@pembrokeshire.gov.uk>
Subject: RE: Mentoring Catch up

Thanks Tracy

Thanks Tracy,

It was great to catch up and hear how you have started working with your mentor.

Bex was on a similar journey to you a few years ago so I'm sure this will be a valuable relationship. I also liked what you said about learning a bit about each other's motivations and goals in order to help each other in the future. It's been a while since she was a Senior Tech and so it will be helpful for her as leader to understand what you're working on.

It would be great to catch up with you a bit later in the summer to see how things have progressed if you have time.

Kind regards,
Duncan

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EV36

Send	Subject	FW: Mentoring in Finance
	Location	Microsoft Teams Meeting
	When	06 July 2021 10:00-10:30
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan
Sent: 30 June 2021 13:39
To: Henley, Vicky
Subject: Mentoring in Finance
When: 06 July 2021 10:00-10:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.
Where: Microsoft Teams Meeting

Hi Vicky, I hope you're well.

I've been conducting some research into mentoring relationships in PCC. I know you've recently been partnered with Jody in a mentoring capacity and I was hoping to catch you soon to talk through your experience so far. I don't need any detail around the conversations you've been having but more around the mentoring structure.

This is an informal meeting but I would like to talk to you about:

- Your feelings about being paired with a mentee by a manager
- The training and positioning you've had in preparation for becoming a mentor
- What you hope to get out of being a mentor
- The benefit you can see to the wider team

I hope that's all ok with you. I can see you're off next week so hope the following Tuesday is ok for you.

Kind regards,
Duncan

EV37

Send	Subject	FW: Coaching and Mentoring Recap
	Location	Microsoft Teams Meeting
	When	30 June 2021 10:00-10:30
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan
Sent: 25 June 2021 15:56
To: Watkins, Julie
Subject: Coaching and Mentoring Recap
When: 30 June 2021 10:00-10:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.
Where: Microsoft Teams Meeting

Hi Julie, I hope this finds you well.

Would you be free to catch up next week to recap the coaching and mentoring work I've been working on?

I met with Steve Lewis in Finance this morning and I'm pleased with how things have progressed in Finance in such a short time.

Let me know if the time above would suit you.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest

Meeting Notes: Coaching and Mentoring Recap

- JW thanks for the groundwork with Finance and C&M
- Discussed long term plan for mentoring and coaching with finance
- Detailed the 'measurables'
 - Better retention/internal promotion
 - Improved mental wellbeing
 - Engaged accountants – additional investment in the service
 - Satisfaction on mentoring from both sides
 - Long term meaningful relationships
- Agreed that approach for winning over finance is with mentoring first and then start to introduce the coaching culture later
- JW interested to see how the finance approach of 'structured mentoring' will work. If the relationships will last or be productive. JW unsure of whether you win hearts and minds by forcing people together but understands the benefits of looking at career pathways as a starting point
- Looking at external coaches for managers in finance – tricky to coach internally as they are used to hierarchical structure – ethical concerns as coaching is part intended in this instance to progress the directorate rather than focus on the managers development
- Benefit for Managers to have a taster session – good to see how quick/effective coaching can be and how it is actually easier on managers in the long run
- Reverse mentoring discussed – possibly a bridge to more coaching style conversations as they flatten structure
- No contact from Building Maintenance – agree they are a hard nut to crack
- L&D to work with BM and Housing in the future to expand coaching plan – aware that in non corporate roles it is challenging to introduce
- DH requested to stay in the loop and join future meetings if possible
- Benefit to Employee Relations means it is relevant to my role