



**AGENDA ITEM**

3.3.2

**PEOPLE & CULTURE COMMITTEE**

**VALUES AND BEHAVIOURS: UPDATE**

<b>Date of meeting</b>	(27/09/2021)
<b>FOI Status</b>	Open/Public
<b>If closed please indicate reason</b>	Not Applicable - Public Report
<b>Prepared by</b>	Sharon Nash, Head of Organisational Development
<b>Presented by</b>	Hywel Daniel, Director for People
<b>Approving Executive Sponsor</b>	Executive Director for People
<b>Report purpose</b>	FOR NOTING

**Engagement (internal/external) undertaken to date (including receipt/consideration at Committee/group)**

<b>Committee/Group/Individuals</b>	<b>Date</b>	<b>Outcome</b>
Nick Carter, Paul Edmonds and Becky Dyer - Organisational Development	(13/09/2021)	SUPPORTED

**ACRONYMS**

CTMUHB	Cwm Taf Morgannwg University Health Board
HoWOD	Heads of Workforce and Organisational Development
ILGs	Integrated Locality Groups
CSGs	Clinical Service Groups
LMS	Learning Management System

VBR PADR	Values Based Recruitment Performance and Development Review
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## 1. SITUATION/BACKGROUND

- 1.1 In April this year we set out on ambitious plan to leverage our values and behaviours as a means of achieving cultural connection across Cwm Taf Morgannwg University Health Board (CTMUHB), and creating a culture for population health. We cited at the time the need to adopt a transformational approach through a number of targeted initiatives, designed for long-term sustainability.
- 1.2 This report provides an update on our progress against those initiatives and planned actions to sustain the work that has already been undertaken. The Committee is asked to **NOTE** the progress towards actions cited in our April 2021 update and **SUPPORT** the continued actions to move us closer to our desired culture.

## 2. SPECIFIC MATTERS FOR CONSIDERATION BY THIS MEETING (ASSESSMENT)

- 2.1 Our activities around values and behaviours in the last six months have been largely centred on creating opportunities for teams to explore the behaviours in more depth, working organically through our Integrated Locality Groups (ILG's) to drive ownership, and being more purposeful in our efforts to make our values and behaviours a lived reality for our staff.
- 2.2 Below is a summary of progress we have made against each element of our Plan:

### Values Cafes & Values Workshops

- 2.3 Feedback from the Values Cafes has been positive, however attendance suggested that the events were attracting staff who were already engaged with our values and behaviours. The Organisational Development Team therefore created plans to transfer ownership of this engagement activity to our locality based Workforce colleagues. Pilot groups have been identified in each locality and will be delivered via Teams for workshop delivery sessions in September and October 2021. To date, we have delivered eight workshops to approximately 108 staff, and will continue to work with our ILG's to identify teams with a desire to engage with our values and behaviours at a deeper level.
- 2.4 We have responded to the feedback from our early Values Cafes and taken the opportunity to amalgamate our Values Cafes and team based Values Workshops, to engage our teams in conversations about living our values.

Our approach has been to utilise the behaviours to enable teams to identify where they could be more effective in their interactions with each other and with patients. We have used this approach with teams who are at different levels of engagement with our values and behaviours, adapting the workshop as appropriate to the needs of the audience. We have not set out to deliver workshops across the whole organisation; rather, we have targeted teams organically across each of our ILG's to build momentum.

- 2.5 Succinct "Back to Basics Values-Based Discussion" sessions have also been co-created with leaders from Facilities and Estates. These sessions will be led locally and will focus on behaviours, how they affect workforce culture, and how they impact on our patients. Outcomes from these sessions will be assessed through a quick-fire Teams survey taken at the start and end of the discussion. It is anticipated that these sessions will commence in October 2021, with the aim of reaching approximately 1,200 staff members.
- 2.6 Additionally, we aim to replicate the "Back to Basics Values-Based Discussion" approach with our Health Care Support Worker population, to be led by ward managers / band 6 nursing staff. These sessions have been put on hold in response to current workforce pressures.
- 2.7 We have now incorporated a distinct session on values and behaviours in our online Corporate Induction and aim to draw on the feedback from new starters to further develop this session. Furthermore, "Introduction to our Values" sessions have been also been developed and delivered to newly appointed nursing staff and graduates.

### **Values in Action Week**

- 2.8 To mark the one-year anniversary of the launch of our Values and Behaviours, a week-long event has been planned to coincide with World Values Day on Thursday 21<sup>st</sup> October 2021. Paul Mears, Chief Executive, will deliver a pre-recorded address on Monday 18 October 2021 to launch the week's events. In light of rising Covid-19 cases and associated workforce pressures, plans to hold on-site Values workshops and sessions have now been moved to virtual offerings.
- 2.9 During this week, we will be hosting events and activities which encourage staff to share incidences of our values and behaviours in positive action, and, conversely, where their lived experience is inconsistent with our values and behaviours, so that we can better understand the barriers associated with that. To bring these experiences to life, there are planned discussion panels, guided discussions and team development activities, and a calendar of events will be communicated shortly.

- 2.10 To champion our Value of “listen, learn and improve” members of the Executive Team will be talking about the significance of organisation values and behaviours within our culture, and how the application of the behaviours will help to deliver the right outcomes for patients and change the organisation for the better.
- 2.11 Furthermore, in observance of Black History Month, we will be hearing from representatives in our BAME network, and how our values and behaviours are reflected in their experiences of working at CTMUHB.

### **Values Based Leadership & Culture Workshops**

- 2.12 We have now initiated the delivery of combined Values Based Leadership and Culture Workshops, commencing with a session with our Executive Team on the 20 August 2021. The workshops have been designed to help leaders:
- 2.12.1 Reflect on their own and others experiences of being led, through the lens of our values and behaviours
  - 2.12.2 Use our values and behaviours to envisage the kind of culture that we want to create at CTMUHB
  - 2.12.3 Identify behaviours which are inconsistent with that culture
  - 2.12.4 Identify barriers and tensions associated with achieving our ideal culture
  - 2.12.5 Agree personal and collective actions to remove or minimise those barriers and tensions
- 2.13 These workshops have taken us deeper into understanding how culture works and the perceived gap between our ideal culture and our existing culture. It highlighted that whilst we have a structure that is ideally designed for Population Health, our culture, systems and processes are not yet fully aligned. It has therefore been agreed that we will run follow up workshops with Executives and their reports, with a stronger forensic lens on the leadership of their senior management teams. It has also been agreed that these workshops will be delivered to the ILG Directors in each of our ILG’s, and later cascaded down to the Clinical Service Group Directors. To date we have delivered one further workshop with the Director of Strategy and Transformation and members of her team, and have a further session booked with the Bridgend ILG Directors.

## **Values Based Recruitment**

- 2.14 We have been consulting widely regarding the introduction of a Values Based Recruitment (VBR) process for CTMUHB. The 'VBR' model has already been successful in NHS England and is designed to deliver a more robust and inclusive process for recruiting senior leaders whose values are aligned to ours.
- 2.15 Our current selection approach of stakeholder and interviews has been overhauled to embed values based interview techniques at the heart of the process. The VBR process has been developed with a move towards a more sophisticated method of assessing both the personality and cognitive ability of future leaders. It is currently being piloted for roles at level 8c and above.
- 2.16 Panel members and hiring managers will be trained in values based interviewing techniques and will have access to a newly developed online VBR toolkit with a full bank of VBR questions, templates and guides. It was our original intention to launch Values Based Recruitment Training for managers via our LMS platform in June, to coincide with the appointment of the newly appointed Talent & Attraction Lead. The launch of the LMS training module has however been delayed, as it has taken longer than anticipated to consult on the new process and pilot the new process. It is therefore anticipated that the Values Based Recruitment Training will now be available as a module on our LMS platform at the beginning of November.
- 2.17 These new processes will ensure that we invest in appointing individuals who are a strong fit for us organisationally, culturally or professionally. It will also ensure that we create a more robust candidate experience for our future leaders and send a strong message about the kind of organisation that we are and what we value. The new VBR process will also help to reduce inconsistencies in our selection processes and minimise the risk of any claims relating to fairness and equality of opportunity.

## **Performance and Development Reviews (PADR)**

- 2.18 The PDR has historically been viewed as more of a process and less of a conversation. At the time of writing 50.76% of CTMUHB staff had completed a PDR within the last six months. This compares to previous year where 53.10% staff had completed a PDR. Time, bureaucracy and an emphasis on a process and upkeep of stats appear to be the main criticisms of the current process.

- 2.19 In April 2021, we set out a plan to undertake a review of our existing Performance & Development Review (PADR) process and develop a toolkit for managers. The review was undertaken in May/June 2021 and proposals consulted through our Employee Experience 'Develop and Retain' Working Group and with a number of key stakeholders.
- 2.20 A trial of the new PDR process commenced on the 6<sup>th</sup> September 2021 with a 'Train the Trainer' session with Line Managers across different ILGs/CSGs. The initial expectation was to complete the trial by the end of September 2021; this looks unlikely due to the availability of individuals nominated to participate in the trial. We have further training events commencing 4 October 2021 and therefore expect to extend the trial period until the end of October 2021. Thereafter this training will be delivered via our Learning Management System (LMS) platform.

### **Staff Survey**

- 2.21 It was our intention to launch a Staff Survey in November 2021 to coincide with the one year landmark of having launched our Values and Behaviours. Feedback from staff from various listening forums have however clearly indicated that we have a fatigued workforce with little appetite to complete any further surveys in the immediate future. Our ILG's are still working through their actions plans from the 2020 staff survey and in the case of Merthyr and Cynon, little has been achieved in terms of further cascading of the early results.
- 2.22 Additionally, we are seeing a significant level of pushback from staff regarding completion of the recent Staff Wellbeing Survey. Reasons cited for this include the fact that there is no agreed national approach on how to communicate the results of the recent Medical Engagement Survey. It is our belief that to subject our staff to another survey at this critical time, when winter pressures are already having a significant impact on capacity, would yield futile results. Furthermore, it would further serve to diminish staff morale, and is inconsistent with our value of listening to staff, learning from our experiences and improving.
- 2.23 It is therefore proposed that we run a targeted campaign early spring 2022 for six weeks, to achieve a robust baseline on values and behaviours, culture, and equality and diversity, as well as measuring where we are against the NHS Wales seven engagement questions.

### 3. KEY RISKS/MATTERS FOR ESCALATION TO BOARD/COMMITTEE

- 3.1 The key risks associated with making our values and behaviours a lived reality remain broadly the same, with some key areas of progress and risk mitigation:
- 3.2 There is still more work to do to align these with our revised four strategic goals. We are taking a long term view and being purposeful in our actions to ensure full alignment with our purpose and strategy.
- 3.3 Leadership remains pivotal to our values and behaviours being a lived reality for our staff and this is being addressed by our targeted actions to engage leaders from the top of the organisation down in discussions about behaviour and culture change, and their critical role within that.
- 3.4 There is more to do to help our staff to understand that our values and behaviours are the gateway to our culture and will help us to deliver the best outcomes for patients.
- 3.5 Making decisions that are consistent with our values and behaviour remain a high priority. We have started to mitigate this risk by challenging leaders to consider how our values and behaviours can be demonstrated in the decisions that they make. We also propose to develop a specific module of training on values based decision making via our LMS.

### IMPACT ASSESSMENT

<b>Quality/Safety/Patient Experience implications</b>	There are no specific quality and safety implications related to the activity outlined in this report. There are no specific quality and safety implications related to the activity outlined in this report.
<b>Related Health and Care standard(s)</b>	Governance, Leadership and Accountability Governance, Leadership and Accountability
	If more than one Healthcare Standard applies please list below:
<b>Equality impact assessment completed</b>	Not required



<b>Legal implications / impact</b>	There are no specific legal implications related to the activity outlined in this report. There are no specific legal implications related to the activity outlined in this report.
<b>Resource (Capital/Revenue £/Workforce) implications / Impact</b>	There is no direct impact on resources as a result of the activity outlined in this report.
<b>Link to Main Strategic Objective</b>	To Improve Quality, Safety & Patient Experience
<b>Link to Main WCFG Act Objective</b>	Work with communities to prevent ill-health, protect good health and promote better health and well-being

#### 4. RECOMMENDATION

- 4.1 The People and Culture Committee is asked to **NOTE** the progress towards actions cited in our April update and **SUPPORT** the continued actions to move us closer to our desired culture.