

ODAG report to Board

19th April 2021

Introduction

This report seeks to

- Update board Members on the outcome of the Colleague Survey
- Confirms the scheduled date for the volunteer survey
- Invites Board Members to confirm a way forward in relation to a proposed external accreditation of the organisation
- Presents the first HR headline report to the Board, with the intention of presenting these quarterly in future

Colleague Survey

Every effective organisation, as part of its ongoing dialogue and engagement with staff, develops mechanisms for capturing feedback around how staff are led, developed and managed. This includes team meetings, supervision sessions, appraisals, staff meetings and exit questionnaires when staff leave the organisation. In addition, and separate to this, ODAG coordinates an occasional survey which seeks to audit the perceptions of the effectiveness of these internal processes.

The methodology utilised is largely based upon the approach adopted by Investors in People and aspires to capture a more independent and arms length measurement of the effectiveness of the day to day processes.

Specifically, the design of the survey enables individuals to express

- their views about their role the support that they receive in undertaking it,
- the training and development that they receive
- and the effectiveness of leadership and communication within Healthwatch Cornwall



The survey was undertaken in December 2020. Each individual had the opportunity to participate electronically and to make a return in an anonymized fashion. A total of 12 responses was received from the staff group.

There were many positive statements around the quality of leadership and support that individuals had received at a time when home working had impacted upon team working and communication. Some helpful feedback was offered in relation to supervision and appraisal practice.

A summary of the outcome has been presented to the Staff Team and in response an agenda for action has been proposed. The key issues included are

- Hybrid working strategy to be developed in consultation with staff (as outlined in Business Plan 2021/22)
- Planned partial return to office when government guidance allows (subject to review and revision of risk assessment) with clear expectations from staff and management (eg self-testing prior to coming into office)
- 1:2:1s (new terminology for supervision) to be set into calendar for all staff and forms cross-referenced to supervision policy within Employee Handbook
- Exit interviews to be introduced for staff leaving the organisation
- Training needs assessment as a formal part of appraisal process (following on from Action Plan after 2019 survey)
- Project plan to be put in place to achieve Healthwatch England Quality Framework
- Weekly message from Mario, and follow-up e-mail to staff with 3 key points from weekly manager's catch up - sent on a rota basis by a different member of the management team (already put in hand)
- Virtual Staff noticeboard as default browser

Volunteer Survey

There have been some significant developments in the last year in the processes whereby volunteers are supported and trained but of necessity, the degree of volunteer activity during the pandemic has been low. It was agreed to defer the ODAG volunteer survey to enable internal discussions to occur first around the impact of the last year on the volunteer role (which have now been completed). It has then been agreed that the Volunteer Survey, which takes a similar form to the colleague survey but with minor changes in wording, will be completed in June 2021 and the outcome reported to the Board.



External accreditation proposals

Increasingly organisations are securing external accreditation in relation to the degree to which they effectively lead, develop and manage the people who are engaged in their activities. Apart from visibly demonstrating to external organisations and funders that the highest possible standards are being met, and demonstrating that the organisation is an employer of choice, some commissioners request such evidenced accreditations whilst evaluating tenders or considering grant applications. As such accreditation can provide both organisational advantage and competitive advantage.

Against this is the argument that preparation for accreditation does involve additional work (although if requirements are already in place, this should be minimal).

ODAG have reviewed the potential contribution of a number of external accreditation schemes and believe that the NCVO Trusted Charity Scheme would be an excellent scheme to consider. It would provide

- external verification of achievement of the Trusted Charity standards
- greater recognition and creditability from statutory and independent funders, users and other stakeholders
- increased motivation for staff, Directors and volunteers
- confirmation that the organisation has reached a recognised quality standard
- enhanced organisational learning through the assessment process.

The Trusted Charity embraces the following quality areas:

- Governance
- Planning
- Leadership and management
- User-centred service
- Managing people (both colleagues and volunteers)
- Learning and development
- Managing money
- Managing resources
- External communications
- Working with others
- Assessing outcomes and impact

Each quality area consists of two levels of achievement, allowing organisations of varying size to choose the most suitable option. The applying organisation can



choose the level according to its staff capacity, resources, organisational culture or working patterns. This is important to ensure that the additional work is proportionate to the benefits received.

Initial enquiries led us to believe that our current organisational status would make Healthwatch Cornwall eligible now, before any organisational status change, and that the budget implications for the process would be minimal. However a sub group of ODAG met to look further into the implications and it transpired that it would have to be Trestadow as a CIO who is eligible to apply, and that the cost would be £2,700 every 3 years.

The sub group then looked at the Healthwatch England Quality Framework which is a standardised framework for local Healthwatch to demonstrate their effectiveness across 6 core headings which are very similar to those outlined above. It is statutory requirement for Healthwatch Cornwall to have adopted this by 31 March 2021, and it has been framed to complement requirements for Trusted Charity. The only resource to meet this Framework is staff time.

Recommendation

- **To focus on Healthwatch England Quality Framework while we set up Trestadow**
With a structured Project Plan in place, managed by a nominated staff member
- **To include application for NCVO Trusted Charity in 2022/23 budget**
With the assumption that Trestadow will be in place to be assessed, and staff resource will be minimal following completion of HE QF

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