

CASE STUDY: IMPROVING STAFF AND VOLUNTEER ENGAGEMENT AT AGE UK CHESHIRE EAST

The NHS North West HR Graduate Training Scheme gives its trainees the opportunity to spend two months working on flexi-placements in organisations that are external to the NHS. Such placements are a great opportunity for trainees to gain experience and share good practice. This develops their skills and confidence, whilst also benefiting the NHS through the knowledge they gain. This case study forms part of a series of three, all of which are based upon placements undertaken by graduate trainees in August and September 2013.

This case study is specifically based upon the flexi-placement that was undertaken at Age UK Cheshire East. There were two focus areas, staff induction and retention. The staff induction involved evaluating the current group induction programme and making recommendations for improvement. The staff retention aspect involved analysing turnover, identifying areas of concern and making recommendations for improvement. The retention aspect also expanded into understanding why volunteers chose to volunteer with Age UK Cheshire East, what made them stay and what would make them leave.

The project involved analysing existing data, designing surveys to gather new information, data analysis and management reports. The two key factors were ensuring that the data analysis translated into relevant and beneficial ideas for improvement for the organisation to take on board and ensuring staff and volunteers felt the benefit of the work that was completed.

Key Outcomes

- **High survey response rate** - first steps taken in direct, formal engagement with staff and volunteers led to a 56% and 50% response rate respectively to the satisfaction surveys.
- **Induction** - new induction evaluation forms inform the organisation's understanding of what people did, and did not enjoy. Due to the invaluable feedback, the evaluation forms can be taken forward to help inform decisions for future group inductions.
- **Retention** - the staff survey highlighted positive results and particular areas where some extra work was needed. For instance, additional work was done on highlighting the importance of appraisals and supervisions. Similarly, the volunteer survey feedback was taken on board and changes made, such as better use of the notice boards within the shops to communicate changes and update people on organisational news.
- **Better communication** - the importance of two-way, relevant communication was highlighted and by opening up formal communication channels, this has prompted



informal discussions between staff and volunteers. The feedback that was delivered helped to encourage conversations about particular issues and address these. By staff, volunteers and management seeing positive changes as a result of the feedback this should help to encourage it to continue.

Background

Age UK Cheshire East is a charitable organisation which supports its local population, being managed by local trustees, and funded by local donations. This is done in partnership with the national charity, Age UK.

The head office is in Macclesfield, where there is shop, with shops also in Poynton, Knutsford and Alderley Edge. The charity has been providing services for people aged 50 and over since 1988 and these are provided across the Cheshire East locality. The services fit into three key elements:

- health and wellbeing e.g. Men in Sheds, art and crafts, walking groups
- knowledge e.g. IT classes, information and advice service
- practical support e.g. help at home, day care

As of August 2013, there were 41 head office and shop staff, 40 home help staff and 246 volunteers on the database. However, it was estimated that approximately 190 of those volunteers were actually active.

Key Aims

The aims fit into three different categories:

Age UK Cheshire East

- evaluate Age UK Cheshire East's current induction process
- begin the process of building and understanding staff retention at Age UK Cheshire East

NHS North West HR Graduate Training Scheme

- meet induction and retention competencies as part of the NHS North West's HR Graduate Scheme's Key Competency Framework
- to provide a developmental opportunity for the graduate trainees as well as bring learning from external organisations back into the NHS and vice versa

HR Graduate Trainee

- to gain an understanding of working in a charitable organisation
- increase awareness of services available for Cheshire East's older population

Key Stages of Setup



How It Works

Staff induction

Evaluation forms were designed to gain both qualitative and quantitative information to ensure that quick indicators and detail were collected. Every member of staff who attended the last two group inductions, which had been the only group inductions, were asked to fill in the evaluation form. They were encouraged to give as much detail as possible to help in improving staff's experiences of the group induction.

The feedback was collated onto one Excel document to allow for easier comparison of the feedback and for identifying trends. All comments were fed back to management, especially issues that all new starters mentioned, both positive and negative.

The feedback was then translated into improvements that could be made to the induction process such as better organisation to ensure the process was streamlined and inductees were not left waiting between talks. The changes suggested were quite different to the traditional, individual inductions that had previously been used, but the feedback from inductees about the group inductions really emphasised the need for a new approach.

Staff and volunteer survey

Starter and leaver data going back to 2010 was collected and used to calculate turnover which varied from 13 – 20%. These figures were then compared to statistics from Xpert HR which included organisations in the North West, organisations of a similar size and organisations from the third sector. The figures showed a real fluctuation but overall Age UK Cheshire East tended to be above the average.

There was a lack of access to qualitative information such as exit interviews or leavers' appraisals and because of this a staff survey was recommended to collect current information. The staff survey enabled insight and understanding into what staff thought of working for the organisation. It was decided to pursue the survey with the volunteers as well, due to the significant impact they have on Age UK Cheshire East being able to deliver their services.

The staff survey was run through Survey Monkey as the head office and shop staff had daily access to computers. The volunteer survey was paper based and involved travelling out to the shops and projects due to the limited contact volunteers had with computer access. The survey was promoted through email when it was first launched and after that through word of mouth, as well as by visiting the project and shop sites. A deadline for responses to the surveys was communicated to staff and volunteers at the beginning of the survey and within a few days of the closing date.



The survey responses were collated and analysed; staff and volunteer results were kept separate. The results of the volunteer survey were further subdivided by shop or project. This was due to the different nature of the project or service that the volunteer was part of and ensured that the feedback was relevant to that area. The quantitative survey data gave a quick indication of the overall feeling among staff and volunteers. The qualitative data allowed for a deeper understanding and more detailed information which it wouldn't be possible to explore from just tick box answers.

Two reports were then produced to formally feed information back into the organisation. One informed management of the outcome of the staff and volunteer surveys and the other was for shop managers and project leaders and focused purely on volunteer feedback. Another aspect of the feedback involved

speaking to the managers, project leaders and shop managers about the reports on a one to one basis, to ensure that any questions were answered and discussions about ideas that could be taken forward were encouraged.

Shop managers and project leaders fed back the information that was provided in the report to volunteers for discussion, particularly with regard to action that would be taken to improve any areas of concern.

For staff, an A4 poster which highlighted key messages from the survey was sent out with contact details should they want to discuss any of the information further. The key messages included both positive and negative feedback as well as any actions that were going to be taken to address the feedback given.

Resources

The funding for the flexi-placement is part of the NHS North West HR Graduate Scheme and no additional funding was needed. There was no additional cost to Age UK Cheshire East in any of the work that was completed.

Key Challenges

Key challenges were all around change management and included:

- a new approach to staff inductions. Staff inductions had always been individual and allowed for flexibility, the group induction process was new, due to an increase in recruitment. The feedback from inductees emphasised the need for change to ensure that the group induction was relevant, engaging and streamlined. However, this required a real shift in the approach used to organise and manage the inductions which proved difficult to alter.
- there had never been a staff or volunteer survey that went across the project and services. There were concerns, which had to be overcome, about the types of questions that should be asked and how to address negative feedback. Best practice evidence and professional experience were used to demonstrate the benefits of doing staff surveys well. This included addressing negative feedback, as this helped staff to see how their views were being taken onboard.
- ensuring a good response rate to both the staff and volunteer survey. This was overcome by explaining to staff and volunteers why it was being done and how the results would be used to improve understanding of issues and make improvements. This was done via email and face to face communication. This resulted in both surveys receiving over a 50% response rate.

Key Learning

This process reinforced the importance of passion in the induction process. The most common feedback about why people enjoyed induction was when they were able to see the projects and services. Seeing the impact they would have on the service users invoked a real sense of pride and value in the work they would be doing. This is something that needs to be remembered when looking at the induction processes to ensure they're engaging and that they encourage passion.

Another lesson highlighted the importance of ensuring communication is open and that the reasoning behind new ideas is clear for those involved in or affected by that change. The reasoning is essential as it helps people to understand why there is a need for change. Once people have an understanding of why the change is important, they are more likely to become open to exploring options to address the issue.

The final lesson centred on understanding staff and volunteers' motivations. It is essential to recognise the difference between someone's commitment to the job and their commitment to the organisation. By appreciating this

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difference but ensuring equal value is placed on harnessing such commitment, organisations should be able to achieve the quality and level of service they strive for.

Next Steps

- Complete another staff and volunteer survey at a similar time in 2014 to compare results and continue to gain benefit from formal staff feedback.
- Encourage feedback about working practices to assist managers, staff and volunteers in communicating issues they may be facing.
- Continue to review group staff inductions and make changes as appropriate.

