



AGENDA ITEM

4.1

PEOPLE & CULTURE COMMITTEE

VALUES & BEHAVIOURS: UPDATE

Date of meeting	(26/04/2021)
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FOI Status	Open/Public
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If closed please indicate reason	Not Applicable - Public Report
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Prepared by	Sharon Nash, Head of Organisational Development
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Presented by	Michelle Hurley-Tyers, Assistant Director of OD and Wellbeing
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Approving Executive Sponsor	Executive Director of Workforce & Organisational Development
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Report purpose	FOR APPROVAL
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Engagement (internal/external) undertaken to date (including receipt/consideration at Committee/group)

Committee/Group/Individuals	Date	Outcome
N/A	(DD/MM/YYYY)	Choose an item.

ACRONYMS

CTMUHB	Cwm Taf Morgannwg University Health Board
TI	Targeted Intervention
ILGs	Integrated Locality Groups
LMS	Learning Management System



PADR	Performance and Development Review
HoWOD	Heads of Workforce and Organisational Development

1. SITUATION/BACKGROUND

- 1.1 The purpose of this report is to update the People and Culture Committee on the next phase of the Values and Behaviours Programme launched on 15 October 2020.
- 1.2 The creation of Cwm Taf Morgannwg University Health Board (CTMUHB) on 1 April 2019 provided an opportunity to bring together the best of both the former Cwm Taf and Bridgend areas, building on the strong synergies of purpose, sharing strengths and creating a compelling vision and cultural narrative, with a set of powerful and engaging values and associated behaviours.
- 1.3 In addition, following Welsh Government's escalation of the status of CTMUHB to Special Measures for Maternity and Targeted Intervention (TI) for Leadership and Culture, Trust and Confidence, and Quality and Governance, the Health Board developed a programme management approach to structure the work underpinning continuous improvement. Values and behaviours sit at the heart of that approach and is inextricably intertwined with the work that we need to do as an organisation to build leadership capability, re-energise our staff around our purpose and vision, and create a more meaningful experience for staff at every stage of their journey within CTMUHB.
- 1.4 Our Values and Behaviours Project has three distinct phases; launch, embed and reinforce. In the launch phase of the project, CTMUHB has made good progress in co-creating our Values and Behaviours framework; launching them across the organisation in October 2020 and beginning to reflect them in our observable artefacts whilst creating the 'At Our Best' site.

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

- 2.1 There is much written about why organisational values fail to have a lasting impact on an organisation's culture. Largely, this is cited upon the fact that many organisations simply define and communicate their values and expect them to stick. As we move into this longer term phase of embedding our values and behaviours, our aim is to adopt a transformational approach which helps to change the underlying culture and sub cultures which exist within CTMUHB.

- 2.2 There are five key principles associated with successfully embedding values and behaviours into the culture of an organisation (see Figure 1.1 below) When our staff are able to move beyond just having an awareness of our values, and there is visible and active leadership engagement at all levels, there is much greater scope for the behaviours to become entrenched into our everyday interactions with each other and with patients. Ultimately, this lived experience of our values and behaviours creates a healthier organisation culture.

Figure 1.1

Embedding values and behaviours into the core of everything that we do requires:



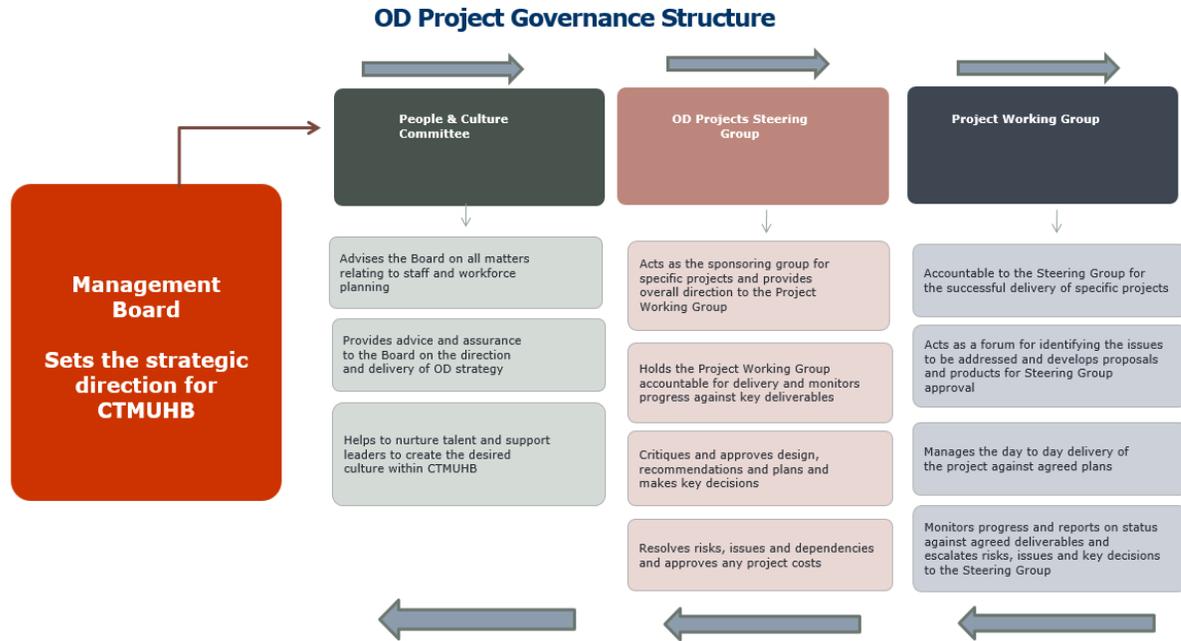
- 2.3 Our plan is to integrate these five overlapping principles into the three phased approach, to drive deeper engagement with our values and adoption of behaviours consistent with those values.
- 2.4 **Embed Phase:** In the embed phase, the emphasis is on enabling staff to integrate the values into their everyday interactions. There is generally no time limit on this phase but it is anticipated that it will last for approximately 6 – 12 months.
- 2.5 In the current embed phase we have initiated a pilot of Values Based Team Workshops, designed to help staff examine their lived experiences of the values against, and create their own team versions of the Values Framework.
- 2.6 Four pilot workshops have been scheduled for April 2021 with the Workforce, Dietetics, Planning, and Corporate Services teams. Both quantitative and qualitative data will be gathered from these workshops to ensure that we are able to assess our starting position for future evaluation through the NHS Wales staff survey and any planned Pulse Surveys.
- 2.7 We have also initiated a series of Values Cafes to provide an opportunity to for staff to reignite interest in our values and behaviours. There has been a noticeable void in levels of engagement around our values and behaviours due

to the pressures that some services have experienced in the height of the pandemic. The Values Cafes are a way of providing a safe, informal space for staff to have a conversation about their experiences in the preceding months and to explore how we might now create greater focus on values and behaviours as we move forward. The first of three Values Cafes were held on the 26th March, with mixed reports of how the values are being experienced in different areas (see Appendix 1).

- 2.8 We are now in the process of designing a series of Values Based Leadership Workshops, where we will work with leaders across our Integrated Locality Groups (ILGs) to examine some of the tensions or barriers which may get in the way of our lived experiences of our values and behaviours. The workshops are also designed to enable leaders to view our values and behaviours through the lens of culture and examine some of the broader systemic issues which may be inconsistent with our values and behaviours. The workshops will also enable leaders to get a better understanding of the strengths that they need to build on in relation to our values and behaviours.
- 2.9 There are two other key activities planned for this phase which are designed to start the process of embedding values and behaviours into our people practices:
- a) The first is developing a values based recruitment workshop to be delivered via our Learning Management System (LMS). This workshop will be launched in June 2021 as part the 'Managing Others' course on our LMS platform. The course will help managers to adopt a more systematic approach to recruitment, where values feature in every stage of the recruitment of recruitment process, from advert through to interview, selection, development and progression.
 - b) The second activity is a complete redesign of our Performance and Development Review (PADR) process. This is a significant piece of work which has three key objectives:
 - a. Review and revise the existing PADR form to adopt a 'what' and 'how' approach which focuses on what has been achieved as well as how the values and behaviours have been evidenced. We propose to complete this review by the end of May 2021.
 - b. Establish a Task and Finish Group to review how the process of one to one's and appraisals can be refined so that our values and behaviours become a feature of everyday interactions between managers and staff. Our aim is have this group up and running by the end of May 2021.
 - c. Develop a PADR Managers Toolkit and deliver briefing sessions to upskill managers in the use of the new PADR forms. This is a

longer term objective which we anticipate will be delivered by September 2021.

- 2.10 **Reinforcement Phase:** The practice of entrenching our values and behaviours is where real behavioural change happens and people begin to change their habits. This is where most organisations fail to invest their efforts. It is a crucial phase where we start to look for sustainable results in behaviours and measurable changes in team effectiveness, organisational health, and ultimately patient care.
- 2.11 In this phase our plan is to run a series of wider culture workshops where staff have the opportunity to more clearly define the kind of culture that we want to create and work through some of the barriers to creating that culture. This is where we will also start to define what good professional behaviours look like and state our expectations of staff at all levels. It is imperative that we are able to align this phase with any activity to reset our purpose, vision and mission, and any key development activity at Executive level.
- 2.12 In the reinforcement phase, it is also our intention to revisit the work that we did in the early values based leadership workshops. This is to assess the progress that managers and leaders have made in embedding the values and behaviours into their teams, and how it has made a difference to how they are perceived as leaders. It is anticipated that this phase will take us into spring/summer 2022.
- 2.13 In the longer term, we need to think about how we recognise and reinforce the positive behaviours associated with our values and ensure that there are stronger mechanisms in place to enable staff to challenge inappropriate behaviours. We also need to ensure that the work that we are doing to embed the values and behaviours into our culture is aligned to our purpose and embedded into the way that we make decisions as an organisation. To achieve this, we are in the process of establishing a Values Based Decision Making Task and Finish Group. The purpose of this Group is to establish some core corporate principles which enable us to think before we act or make any key decisions. The timescale for this group to be established is May 2021.
- 2.14 A more robust plan around communications is being developed in partnership with our communication colleagues to help shift the focus from being communications led to being engagement led. This will create opportunities for people to talk about values and behaviours so that they are a regular feature in meetings, presentations and everyday exchanges.
- 2.15 Finally, we have now established an OD Projects Steering Group attended by senior stakeholders from across our three ILG's and Corporate Directorate. The Steering Group's primary remit is to provide overall direction and support to OD projects, including values and behaviours. Figure 1.2 below illustrates the Governance Model agreed by the Steering Group.



2.16 The outline plan below summaries the key actions identified in this paper with timelines and indicative measures.

Outline Action Plan

Activity	Timeline	Measures
OD Projects Steering Group established	March 2021	Feedback from Steering Group
Values based team workshops	April 2021 and ongoing	Feedback from attendees
Values Cafes	March 2021 and monthly thereafter	Feedback from attendees
Values based leadership Workshops	July – September 2021	Evaluation sheets and qualitative feedback from attendees
PADR Redesign	End April 2021	Feedback from ILG key stakeholders
PADR Toolkit developed	End May 2021	Feedback from ILG key stakeholders
PADR upskilling for managers	May – July 2021	LMS Evaluation



Culture Workshops	October – December 2021	Workshop evaluation sheets Staff Survey Pulse Survey
Revisit values based leadership workshops	December 2021 – January 2022	Leadership 360 feedback and listening sessions
Staff Survey	November 2021	Values, culture and leadership based survey results
Pulse Survey	April 2022	Values, culture and leadership based survey results

3. VALUES & BEHAVIOURS OUTCOMES AND MEASURES SPECIFIC

The strategies and activities included in this paper are intended to support a change in the culture of CTMUHB and deliver a number of key outcomes:

- Employees across the organisation are empowered to live by our values and behaviours
- Different ways of working needed to change the culture of CTMUHB are adopted and reflect the lived experiences of staff
- Behaviours become entrenched into the way that we manage our staff
- Learning is an organisational priority and embedded across the organisation
- The organisational culture supports openness and honesty at all levels within the organisation
- Staff are proud to be advocates of our organisational values

These are specific outcomes which we propose to measure through a planned pulse survey in the autumn, ideally around the 21st of October 2021 which is World Values Day.

4. KEY RISKS/MATTERS FOR ESCALATION TO BOARD/COMMITTEE

- 4.1 There are a number key areas of risks associated with embedding values and behaviours into our culture:
- 4.2 **Values without purpose:** Whilst the work that we are doing around values and behaviours is being fully integrated into our leadership development and employee experience programmes, work around our purpose and vision has not yet been aligned. This is generally the more challenging part of



embedding values and behaviours into our culture and the fact that we have not restated our purpose and vision is a risk.

- 4.3 **Leadership:** The second area of risk is potentially that as leaders we fail to play an active and visible role in adopting the values and behaviours and role modelling that to the wider organisation. There is already some good feedback from Merthyr and Cynon about the values becoming a regular feature in weekly leadership meetings and we need to be able to replicate this right across CTMUHB.
- 4.4 **Insufficient Time:** Another area of risk is that we fail to invest the time and effort needed in the embed phase and the desired changes in behaviour do not materialise. We need to perceive this phase of the project as a transformational effort that needs to be fully integrated with other long term plans around service improvement, leadership development and alignment with the new ILG structure, not as a silver bullet for our current challenges.
- 4.5 **Ownership:** Our values and behaviours need to be owned by every single employee for that ownership to be felt at an organisational level. That means that in everything that we do from this point forward we need to equip managers and staff with the tools and know-how to engage with the values in a business as usual way.
- 4.6 **Decision making:** There is a risk that our values and behaviours do not permeate across the organisation resulting in key decisions being made which are inconsistent with our values and our purpose. We need to agree some key ethical principles to underpin the way that we think and act and make decisions as an organisation.

5. IMPACT ASSESSMENT

Quality/Safety/Patient Experience implications	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.
Related Health and Care standard(s)	Governance, Leadership and Accountability
	If more than one Healthcare Standard applies please list below:



Equality impact assessment completed	Not required
Legal implications / impact	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.
Resource (Capital/Revenue £/Workforce) implications / Impact	There is no direct impact on resources as a result of the activity outlined in this report.
Link to Main Strategic Objective	To Improve Quality, Safety & Patient Experience
Link to Main WBFG Act Objective	Work with communities to prevent ill-health, protect good health and promote better health and well-being

6. RECOMMENDATION

The Committee is asked to:

- 6.1 **Note and approve** the strategies outlined in this paper to fully embed our values and behaviours into our culture (section 2.2 – 2.18).
- 6.2 **Note** the actions and timeline outlined to engage staff in the process of embedding and reinforcing our values and behaviours (section 2).
- 6.3 **Note** the risks and recommendations to mitigate them (section 4.1 – 4.6).

Appendix 1



**MAE EIN
GWERHOEDD
YN EIN HELPU
NI I FOD AR
EIN GORAU**
#CTMareingorau

**RYDYN NI'N
GWRANDO,
YN DYSGU
AC YN GWELLA**

**WE LISTEN,
LEARN AND
IMPROVE**

**RYDYN NI'N
TRIN PAWB
A PHARCH**

**WE TREAT
EVERYONE
WITH RESPECT**

**RYDYN NI I GYD
YN CYDWEITHIO
FEL UN TIM**

**WE ALL WORK
TOGETHER
AS ONE TEAM**

**OUR VALUES
HELP US BE AT
OUR BEST**
#CTMatourbest

VALUES CAFE

INSIGHTS FROM OUR FIRST ROUND OF CTMUHB
VALUES CAFES (HOSTED 26 MARCH 2021)