



**PWYLLGOR DIWYLLIANT, POBL A DATBLYGU SEFYDLIADOL
PEOPLE, ORGANISATIONAL DEVELOPMENT & CULTURE COMMITTEE**

DYDDIAD Y CYFARFOD: DATE OF MEETING:	16 December 2024
TEITL YR ADRODDIAD: TITLE OF REPORT:	Retention Planning Objective Update, including Staff Discovery Retention Update
CYFARWYDDWR ARWEINIOL: LEAD DIRECTOR:	Lisa Gostling, Executive Director of Workforce & OD/Interim Deputy CEO
SWYDDOG ADRODD: REPORTING OFFICER:	Christine Davies, Assistant Director of OD, Corinna Lloyd-Jones, Head of Organisation Relations & Elin Brock, Head of Research, Innovation & Improvement

Pwrpas yr Adroddiad (dewiswch fel yn addas)

Purpose of the Report (select as appropriate)

Er Gwybodaeth/For Information

ADRODDIAD SCAA

SBAR REPORT

Sefyllfa / Situation

This report provides a progress update in relation to our retention work programme, with a particular focus on the following Planning Objective for 2024-25:

Nursing, Medical and Allied Health Professional (AHP) and Healthcare Scientists (HCS) retention Task and Finish Groups will identify opportunities that enable staff to share unique cultural experiences in order to identify, deliver and realise opportunities to work differently across the Health Board, with the aim of achieving a reduction in staff turnover of:

- **Nursing: 0.5%**
- **Medical: 1%**
- **AHP and HCS: 1%**

The Staff Retention Discovery Report was commissioned in 2023 to learn more about the experiences of our staff working at Hywel Dda to support our retention strategy and provide further intelligence on retention issues. Gaining a deeper understanding of our culture through our staff's lens not only provided us with the opportunity to 'deep dive' into our Retention Planning Objective, but also understand experiences across all staff groups.

A key focus of our retention priorities since April 2024 has been embedding the recommendations made within the Discovery Report on Staff Retention, which was shared with the PODCC in February 2024 and therefore this report also provides an update in relation to how we are progressing with implementing the recommendations included in the Discovery Report, as well as progress on the Retention Planning Objective.

This report also aligns to the following de-escalation criteria relating to targeted intervention for the Leadership, Capability and Culture domain and provides evidence to support the journey towards de-escalation:

"A culture of listening, learning and improving is embedded throughout the organisation based on early and rapid triangulation and resolution of issues from a variety of sources, including quality, mortality, staffing levels, patient outcomes, user and staff feedback"

“Plans are in place to develop a sustainable workforce resulting in improved retention and staff well-being, a reduction in the number of vacancies and the number of interim and agency staff, workforce plans and clinician job plans are reviewed annually to ensure that the organisation can deliver the requirements of the annual plan”

Cefndir / Background

This report provides a progress update in relation to the work of our OD team in line with the specific Planning Objectives and Discovery Report noted above, however much appreciation is also extended to our colleagues across the Workforce and OD (WOD) directorate for their pioneering collaborative work to support Hywel Dda’s staff retention intent. We are also grateful to our leaders, staff and TU colleagues for continuously coming together with a compassionate shared purpose of co-creating better ways of working across our Health Board to improve experiences at work.

We also acknowledge the vital work of our OD Relationship Managers in supporting our Health Board’s attraction and retention plans by helping to establish the organisation as an attractive and desirable place to work through providing proactive and responsive support to local teams to enable healthy and happy micro working cultures.

At the beginning of our retention journey in 2021, Hywel Dda was the first Health Board in Wales to make a proactive investment in specific strategies to create environments that support, nurture and retain our workforce, as well as develop and expand our future pipeline. When our Nurse Retention Group was initially established in 2022, we committed to deliver a 1% reduction in turnover of nursing and midwifery staff in 2022-23, however we achieved beyond this ambition, as illustrated below.

Nurse Retention Turnover		Turnover %
Registered	12 months to Dec 22	8.19%
	12 months to Dec 23	5.15%
Unregistered	12 months to Dec 22	8.94%
	12 months to Dec 23	7.16%

Through working with our finance colleagues, we estimate a resulting cost benefit of £2,163,626, based on the avoidance of higher agency cost to cover vacancies. This amount does not include the costs associated with recruitment and productivity loss had we needed to fill the vacancies.

More recently, we have also welcomed HEIW’s articulation of the NHS Wales ambition in relation to retention, as noted in the newly-developed National Retention Hub ([National Retention Hub - Gwella HEIW Leadership Portal for Wales](#)):

Staff retention is a vital part of sustaining and growing our NHS workforce to meet the increasing and changing service demands across Wales. In recent years our staff have been leaving the NHS at an increased rate, due to a variety of staff experience reasons. In response, it was recognised that action was needed and the Belong, Thrive, Stay National Retention Programme was established in 2023.

To support the delivery of the Belong, Thrive, Stay National Retention Programme and ensure a collaborative and collective approach to improving staff retention across NHS Wales, a National Retention Lead, and ten organisational Retention Lead posts have been funded by HEIW on a two-year fixed-terms basis (commenced February 2024). We are extremely grateful for this support which has given Hywel Dda an exciting opportunity to accelerate and

strengthen our excellent work already underway, whilst aligning with the NHS Wales programme.

Asesiad / Assessment

For the purpose of logically structuring this report, the following section illustrates our work in relation to:

- Retention Task and Finish Groups
- Discovery Report on Staff Retention

Retention Task and Finish Groups

To note, our Nurse, Medical and AHP and HCS Retention work programmes dovetail with the following criteria set out in the Welsh Health Circular//2024/017 which we regularly provide assurance against:

- Implement and monitoring of the Nurse Retention Plan.
- Implement and monitoring of other professional group retention strategies.

Each of our Retention Groups are jointly sponsored by our Workforce and OD and relevant Clinical Directors, with the overall aim of:

- Overseeing projects to deliver an improvement in the turnover of Nursing and Midwifery/Medical/AHP and HCS colleagues across Hywel Dda to be the best in the NHS in Wales.
- Exploring how our colleagues feel about their unique experiences at work and what changes the organisation needs to put in place to improve.
- Contributing to a reduction in turnover (as agreed annually in line with Planning Objectives).

Additionally, the agreed overall responsibilities of each Group are to:

- Identify, deliver and realise opportunities to think and work differently, with a focus on enhancing how we resource and retain our Nursing and Midwifery/Medical/ AHP and HCS staff, utilising national and local guidance and initiatives to bring into the workplace.
- Facilitate the reputation of Hywel Dda as an employer of choice.

As part of the exploration phase prior to establishing each of our Retention Groups, we carefully analysed the data and intelligence for each staffing group, including a bespoke paper in relation to Retention Research for the specific staffing group prepared by our OD Researcher, layered with Health Board baseline data. Engagement and planning workshops were then held with key stakeholders to start shaping an action plan to develop responses grounded in organisational evidence and learning.

We have also developed a dedicated SharePoint page for retention, which helps signpost and act as an online hub to host positive stories and promote our ongoing work.

Nurse Retention

Our Nurse Retention Group was initially established in 2022 and continues to meet on a 4-week basis. Our Health Board Nurse Retention Action Plan has been mapped to the NHS Wales Nurse Retention Plan to ensure alignment with national priorities and we have continued the positive trajectory of implementation. The project planning for all areas of the plan include:

- Shaping Organisational Culture
- Understanding our Data and Communicating with our Staff
- Supporting New Starters and Those Changing Roles
- Supporting International Staff

- Development and Career Planning at all stages of an employee's career
- Flexible Working
- Flexible Retirement
- Health and Wellbeing
- Recognising and Rewarding Staff

Some recent examples of work include:

- Supporting International Staff: contributing to the NHS Wales IEN app which supports their onboarding.
- Development and Career Planning: progressing the 'Day in the Life' stories, where we collect experiences of nursing staff from a demographically wide selection to understand their unique individual experiences and highlight areas of good practice. This will also help to showcase different ways of obtaining qualifications and entering nursing roles within the Health Board, which will hopefully support internal movement within the organisation.
- Flexible Working: working in partnership with our TU colleagues, a Task and Finish Group has been established, consisting of managers and staff who have a progressive approach to flexible working. An example of a key action undertaken to date is a flexible working maturity assessment pilot project, due to begin in January 2025, which is being planned and managed from a quality improvement perspective and includes two nursing unscheduled care teams (BGH and PPH).
- Flexible Retirement: working in partnership with our TU colleagues, a Task and Finish Group has been established, consisting of managers and staff who have experienced the retire and return process. Examples of key actions undertaken to date include creating a video as a training resource for both managers and staff to showcase how a coaching conversation can take place on the subject of flexible retirement and creating a SharePoint page to capture all information pertaining to retire and return.
- Recognising and Rewarding Staff: capturing positive and empowering staff stories of best practice and 'centres of excellence' across the Health Board which hold significant learning value, and thereby act as an important means of increasing energy and motivation around how we scale and spread some of these transformational changes.

In terms of progress to date, although our 12-month Nursing turnover rate has increased from 5.05% in October 2023 to 5.87% in October 2024 (+0.82%), our trend analysis has identified an increase in October each year since 2020, with the exception of 2022. Nevertheless, we are extremely proud to continue to be the best performing NHS organisation in Wales for our registered nursing turnover rate.

We also receive regular positive feedback from the NHS Wales Retention Community of Practice regarding our successful approach to retention. When the National Retention Lead joined our Nurse Retention Group meeting on 6 November to share an update in relation to the NHS Wales Belong, Thrive, Stay National Retention Programme, she acknowledged the difficulties of gaining traction in retention strategies and praised Hywel Dda's 'perseverance and innovation which is leading the way across NHS Wales'. Our Health Board's Retention Lead and Head of Organisation Relations were also recently invited to deliver a presentation in the Rural Health and Care Wales Conference: *Reflection and Future Direction – achievements in rural health, care and wellbeing over the last 10 years and what lies ahead*, where they showcased our Nurse Retention work programme as part of a session focused on recruitment and retention of health and care professionals in rural areas.

In the context of our Medical and AHP and HCS retention progress updates to follow, of note is one of the key learnings from our Nurse retention work in relation to a time lag from the

establishment of the Task and Finish Group to when the sustainable reduction in turnover begins to take effect.

Medical Retention

Our Medical Retention Group was established in 2023 and continues to meet on a 6-week basis. In June of this year, in collaboration with our Executive Medical Leadership Team, we committed to increasing the engagement of our clinical colleagues with the Group and are currently exploring pilot projects to support this. We also widened membership of the Group to ensure representation from Primary Care, GPs and Mental Health, and our Interim Deputy Medical Director has stepped into the role of Co-chair, alongside our Head of Organisation Relations to reinforce the clinical commitment.

Our Medical Retention Action Plan mirrors the headings and elements of our Nurse Retention Plan. In the same way that we capture staff stories for Nurse Retention, we are utilising this methodology through engaging with our medical colleagues to capture positive experiences and spotlight best practice. In relation to Development and Career Planning, a further example of work is increasing education in relation to the portfolio pathway (CESR).

In terms of progress to date, our 12-month Medical turnover rate has decreased slightly from 12.11% in October 2023 to 11.94% in October 2024 (-0.17%).

AHP and HCS Retention

Exploration work and research is being finalised ahead of establishing our AHP Retention Group in December 2024. Supported by the Executive AHP and HCS Leadership Team, we have engaged with key stakeholders, including the AHP and HCS Forums. There is also an ongoing communication within the NHS Wales Community of Practice groups to support this work, where our Health Board Retention Lead is engaging nationally to ensure alignment.

Our Health Board Retention Lead was also recently invited to deliver a presentation at the National Imaging Programme Annual Conference at the National Imaging Academy Wales, where she showcased our practical ways of improving culture within teams.

Although this Retention Group will not be fully established until December 2024, in terms current figures, our 12-month AHP turnover rate has increased from 8.51% in October 2023 to 9.39% in October 2024 (+0.88%) and HCS turnover rate has increased slightly from 7.60% in October 2023 to 8.07% in October 2024 (+0.47%).

Turnover figures also now form part of the Directorate Escalation Framework and are monitored monthly.

Discovery Report on Staff Retention

Within the context of our unprecedented workforce supply challenges, in 2023 a further staff Discovery Report was commissioned to understand experiences of working at Hywel Dda and discern what we can do to help keep our valuable staff in our employment where they can live healthy and happy lives. The rich learning provided within the Discovery Report has allowed us to understand more about our organisational culture and the impact this can have on staff retention. It provides us with much insight into how our workplace culture could evolve, to be part of the contribution to our culture change journey and making Hywel Dda a great place to work.

The key themes identified from the staff experiences regarding where they feel we need to improve and think differently are:

1. Accelerate the ownership, pace and impact of our cultural journey.
2. Leadership of people is a fundamental of organisational success.
3. Be bolder and more courageous in our approach to retention.
4. An Ambitious plan for modernisation.

The recommendations made within the report in line with the above themes have been embedded into the next phase of our values-based culture change journey programmes and progress will be recorded as part of our culture update report to the PODCC in April annually.

1. Accelerate the ownership, pace and impact of our cultural journey

The Discovery report highlighted the need to focus the next stage of our cultural progression on gaining a deeper understanding of our culture, particularly in relation to those issues that may have been perceived to be 'acceptable' in the past or may be 'undiscussable' for a variety of reasons.

a) OD Relationship Managers (ODRM)

Every directorate across the Health Board is supported by an ODRM, who focuses on promoting and providing proactive and responsive support through engaging with services/teams to facilitate an understanding of what makes the greatest difference in improving the experiences of their staff. They work collaboratively to build a true picture based on the interpretation of qualitative and quantitative intelligence from various workforce data sources, which informs the co-creation of strategically aligned, but locally owned, People Culture Plans to help transform embedded cultural norms.

b) Sexual Safety in the Workplace

In recognition of our commitment to courageous organisational learning and adaptation, in April 2024 we established a Task and Finish Group to deepen our understanding of workplace misogyny to influence next steps in our approach of creating a psychologically safe culture where staff can speak up for change. The initial part of this work has included working in collaboration across the WOD directorate to triangulate data and intelligence, whilst also considering models of best practice in other organisations, such as WAST's work on reducing misogyny and improving sexual safety in the workplace.

Importantly, this work also supports the Health Board's obligations under the new Worker Protection (Amendment of the Equality Act 2010) Act which came into force on 26 October 2024 requiring employers to take proactive measures to prevent sexual harassment in the workplace. It also ensures alignment with national priorities given the recent NHS Wales commitment to tackle barriers to sexual safety in the workplace. This includes developing a set of national commitments that align with the freedom to speak up safely and working in confidence agendas, and a Sexual Safety Policy supported by an e-learning module which we anticipate will be in place in the New Year.

This national work programme will complement our local approach and our Task and Finish Group is currently developing an implementation plan which will come into effect in Spring 2025.

2. Leadership of people is a fundamental of organisational success.

Hywel Dda has an ambitious strategy in place to improve the health of the population, by prevention of ill health, as well as an integrated, whole system approach to the provision of services. This strategy is a major cultural shift and the Discovery Report noted that to make this a reality, a leadership shift needs to happen that sees the organisation embrace a different way of leading that is centred on human connections, creating a sense of belonging, collaborative decision-making and embracing change.

Alongside this, the Health Board has been undertaking a number of organisational change processes (OCPs) to ensure that we can flexibly respond to future challenges. A fundamental review of our Operations directorate has been undertaken to evolve the clinical leadership model and structures beneath it. This has enabled Nursing, Medical and AHP and HCS teams to consider the best structure to help us deal with the operational and financial challenges we currently face and are likely to face in the future.

a) Attraction, talent acquisition and senior appointments

The attraction and appointment of high-quality candidates into senior leadership roles is key to the Health Board being able to deliver on its current objectives and future plans, therefore we have undertaken a review of strategy, and improved our approach accordingly. All senior leadership recruitment episodes should now incorporate a minimum of three individual assessments to include a structured interview, psychometric testing (in line with the Health Board's leadership talent management) and an assessment of values (in line with the Health Board's values and behavioural framework).

December 2023 saw the conclusion of the initial development centre for our aspiring Assistant Director talent pipeline, where 6 leaders were offered places within the talent pool. All 6 members have met with the Talent Management team and have agreed their development objectives based on the learning from the development centre and subsequent feedback sessions that will support their transition into an Assistant Director role, at such time that a suitable role becomes available. This is a pioneering approach for Hywel Dda which provides an excellent opportunity for aspiring Assistant Directors to identify themselves as our potential future system level leaders.

b) Leadership Development Programme Offer

The Discovery Report observed a system whereby managers are embroiled in managing services to patients and called upon our people to take a step back and remember, if we manage our people well, they will manage the service well for us. There are a range of programmes in place to support leadership development:

LEAP (Leadership Engagement with Awesome People)

Our LEAP (Band 7-8c) programme develops and supports leaders, enabling them to respond and adapt to the challenges both now and in the future. To date, our senior leaders across Hywel Dda are benefiting from LEAP as follows:

- 4 cohorts have been delivered for 63 leaders.
- 4 cohorts are in progress for 61 leaders.
- 4 cohorts are planned for 2025.

New Consultants Development Programme

Our New Consultants Development Programme enables our new consultants to learn more about Hywel Dda as an organisation, while simultaneously establishing a network of peers from

across all sites. To date, our consultants across Hywel Dda are benefiting from the New Consultants Development Programme as follows:

- 3 cohorts have been delivered for 48 consultants.
- 1 cohort is planned for 2025.

Depending on the number of consultants coming through medical recruitment, and other expressions of interest, we may be able to host an additional cohort in 2025, possibly with an Autumn 2025 start.

Coaching Capacity and Capability

Our Coaching Network was established to support change, build leadership capacity and help colleagues develop throughout their careers, by creating a sustainable coaching culture in line with Hywel Dda values. We have continued to grow our internal coaches, offering qualifications and continuous professional development (CPD). To date, we have 37 qualified coaches in our network, with 22 trained and currently completing their necessary coaching hours to complete their qualification. Additionally, approximately 260 coaching sessions have been undertaken in the past 12 months.

To extend our coaching culture, our Coach-Approach Programme continues to embed leading with a coaching style as part of everyday work. It has been designed to provide leaders with the principles and skills to develop a coaching style of leadership. To date, 15 cohorts for 189 people have been delivered.

c) Management development programme offer

The Discovery Report highlighted the pressure on middle managers across the Health Board and suggested that we need to consider how we better support this cohort of staff.

Subsequently, in June 2024, 'The Hywel Dda Manager' programme was established by our People Development colleagues to empower supervisors and managers (Bands 3-7) to become more effective, inclusive, resilient and compassionate.

To date, 5 cohorts are in progress for 82 supervisors and managers, delivered in Carmarthen, Llanelli and Aberaeron, with Haverfordwest due to launch in January 2025. In April 2024, 203 applications were received for 112 places.

Cohort 1 is due to complete the programme in November 2024 and the application window has opened for the next cohorts to be delivered in 2025 in Carmarthen, Llanelli, Haverfordwest and Aberaeron.

d) Reviewing our staff well-being offer for managers to manage in a compassionate way

The vital support our Staff Psychological Wellbeing Service continues to provide all staff with the knowledge, skills and resources to pay attention to their mental wellbeing and support our leaders to support their teams in a compassionate way. One to one management consultation is a vital resource for our leaders to address complex staff and team issues, and a series of sessions on mental health and wellbeing at work have been integrated into a number of the Health Board's management and leadership development programmes.

The WOD recent OCP has now consolidated staff wellbeing services within one pillar, bringing Occupational Health and Staff Psychological Wellbeing together to support an improved integrated service offer.

e) Evolving our performance management framework

To effectively support our Hywel Dda values and purpose, the Discovery Report recognised a need to review our performance management framework for how we assess behavioural competencies and manage competencies to support staff and managers to be at their best. This encompasses the behaviour, values and competencies that we want to see across all levels of hierarchy.

In response, an Evolving Performance Management Task and Finish Group has been established to provide leadership and support to the Health Board in developing a framework for compassionately managing staff performance as an integral part of its managing performance agenda. The remit of the Group is to:

- Develop a managing poor performance framework which encompasses how poor performance is effectively managed through a compassionate leadership lens.
- Develop a framework that aligns with performance management which supports succession planning through planning individual career paths and development.
- Provide a forum for the sharing and implementation of ideas, good evidence-based practice and policy guidelines.
- Monitor and evaluate activities/actions and report progress to appropriate groups/committees.
- Align any frameworks to support the Values and Behaviours Framework.

3. Be bolder and more courageous in our approach to retention.

The Discovery Report highlighted the need to see a fundamental shift in the ownership of and buy-in to how retention within our clinical professions is taken forward. The progress update in the previous section on Retention Task and Finish Groups has provided the Committee with progression evidence that Nurse, Medical and AHP and HCS leadership has been assigned to lead these issues relating to the retention agenda, with ownership clearly sitting within the professions themselves and supported by WOD colleagues.

4. An ambitious plan for modernisation

The Discovery Report recognised that the Health Board has suitable resources available within the establishment to support innovation, improvement, and transformation, however it was clear that the resources were spread across the organisation and lacked a programme and systematic approach. This resulted in a silo and disjointed approach and therefore a recommendation within the Discovery Report was to undertake a review of support services that facilitate innovation, transformation, and improvement to move towards an integrated approach. An integrated approach would enable the organisation to maximise its existing resources to lead on strategic programmes of change and modernisation. Discussions have taken place at Executive level regarding progressing these issues during 2025.

Argymhelliad / Recommendation

The Committee is requested to:

- Note progress relating to the retention work programmes to date, including the actions arising from the staff retention discovery work.
- Take assurance that with these work programmes being on track, and also with the turnover figures being monitored as part of the Escalation Framework, that appropriate progression towards the ambitious target figures will be made within the full year timeline.

Amcanion: (rhaid cwblhau)
Objectives: (must be completed)

Committee ToR Reference: Cyfeirnod Cylch Gorchwyl y Pwyllgor:	To provide a progress update to the PODCC in relation to our retention work programme, with a particular focus on the Retention Planning Objective and Staff Retention Discovery Report.
Cyfeirnod Cofrestr Risg Datix a Sgôr Cyfredol: Datix Risk Register Reference and Score:	N/A
Parthau Ansawdd: Domains of Quality Quality and Engagement Act (sharepoint.com)	7. All apply Choose an item. Choose an item. Choose an item.
Galluogwyr Ansawdd: Enablers of Quality: Quality and Engagement Act (sharepoint.com)	6. All Apply 6. All Apply 6. All Apply 6. All Apply
Amcanion Strategol y BIP: UHB Strategic Objectives:	1. Putting people at the heart of everything we do 2. Working together to be the best we can be 3. Striving to deliver and develop excellent services 6. Sustainable use of resources
Amcanion Cynllunio Planning Objectives	1 Workforce Stabilisation Not Applicable Choose an item. Choose an item.
Amcanion Llesiant BIP: UHB Well-being Objectives: Hyperlink to HDdUHB Well-being Objectives Annual Report 2021-2022	2. Develop a skilled and flexible workforce to meet the changing needs of the modern NHS 5. Offer a diverse range of employment opportunities which support people to fulfill their potential Choose an item. Choose an item.

Gwybodaeth Ychwanegol: Further Information:	
Ar sail tystiolaeth: Evidence Base:	Included within the body of the report.
Rhestr Termau: Glossary of Terms:	Included within the body of the report.
Partion / Pwyllgorau â ymgynhorwyd ymlaen llaw y Pwyllgor Diwylliant, Pobl a Datblygu Sefydliadol: Parties / Committees consulted prior to People, Organisational Development & Culture Committee:	N/A

Effaith: (rhaid cwblhau) Impact: (must be completed)	
Ariannol / Gwerth am Arian: Financial / Service:	N/A

Ansawdd / Gofal Claf: Quality / Patient Care:	N/A
Gweithlu: Workforce:	N/A
Risg: Risk:	N/A
Cyfreithiol: Legal:	N/A
Enw Da: Reputational:	N/A
Gyfrinachedd: Privacy:	N/A
Cydraddoldeb: Equality:	N/A