



ENGAGE
FOR
SUCCESS



ENGAGING THE ENGAGED?

EMPLOYEE ENGAGEMENT IN THE NOT-FOR-PROFIT SECTOR

March 2017

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Employee Engagement in the not-for-profit sector

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FOREWORD

BY DAVID MACLEOD OBE
CO-CHAIR OF ENGAGE FOR SUCCESS

Working for a not-for-profit organisation is good for your health!

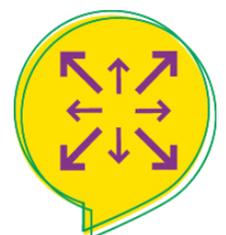
We might all appreciate the altruistic feeling we can get from working or volunteering for a not-for-profit organisation, but the fact is that its impact goes well beyond this feeling. Evidence shows that working in this sector is good for individuals' satisfaction with their jobs (despite lower pay), with some studies extending this to life satisfaction more generally.

You just have to rewind to summer 2012 and the Olympics and Paralympics in London to bring this to life. The 70,000 'Games Makers' were undoubtedly one of the highlights of London 2012. We were met with headlines including 'How volunteers made the Games', suggestions that the Games Makers should win the BBC's Sports Personality Team of the Year award and #BigUpTheVolunteers trending. It was on the back of this that we formed the Engage for Success not-for-profit thought and action group to explore this magic ingredient.

Starting with the hypothesis that the not-for-profit sector has higher rates of employee engagement than most, the thought and action group has challenged this perspective and explored some of the excellent practice that exists.

Although there is no 'one size fits all' approach and no master model for successful employee engagement, four common themes emerged from the extensive research I undertook with my co-Chair Nita Clarke. Taken together, they include many of the key elements that go to make successful employee engagement. These four enablers of engagement have proved to be useful lenses which can help organisations assess the effectiveness of their approaches, and they are the basis of sharing some excellent case studies within this toolkit.

The purpose of this toolkit is to share good practice case studies and these organisations' 'tips and tools for success'. We've aimed to present them in a way that can be easily understood, and if relevant, replicated, to further enhance employee engagement in a sector that has such positive impact. There is also plenty that organisations outside the not-for-profit sector could learn from these examples.



CONTENTS

1	EXECUTIVE SUMMARY	6
2	INTRODUCTION	7
3	BACKGROUND	8
4	FINDINGS	10
5	BEST PRACTICE	13
6	THE CASE STUDIES	16
	BRITISH RED CROSS	16
	WATERAID	19
	VSO	20
	CANCER RESEARCH UK	21
	JEWISH CARE	25
	CAFOD	29
7	CONCLUSIONS & RECOMMENDATIONS	33

1 EXECUTIVE SUMMARY

The state of engagement in the UK remains low, with only around a third of workers being highly engaged. In the UK not-for-profit sector, this proportion would see over half a million employees not highly engaged.

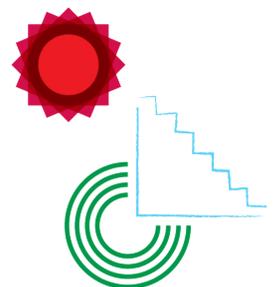
Although the headlines from our not-for-profit research may indicate otherwise (the most frequently occurring engagement scores are in the 80-90% range), the reality is that these scores mask genuine engagement rates.

This toolkit provides advice on how to more accurately measure employee engagement rates in our sector. It also offers best practice case studies from British Red Cross, CAFOD, Cancer Research UK, CIPD, Jewish Care, VSO and WaterAid. They are presented through the lens of the four enablers that Engage for Success found drive engagement; strategic narrative, employee voice, engaging managers and integrity.

As a result of our research we have a number of recommendations:

1. Educate managers as to their role in the creation of an engaging environment within their teams and establishing a greater sense of ownership and accountability for survey results and engagement scores.
2. Focus attention on the four enablers of engagement (strategic narrative, employee voice, enabling managers and integrity) with a view to identifying improvements in practices that would enhance effectiveness across each of these key aspects, with a particular emphasis on managers and employee voice.
3. Educate leaders about the importance of engagement, supported by a better understanding of the relationship between employee engagement and other organisational performance indicators, in order to position engagement as a transformational organisational process.
4. Re-examine the process whereby survey results are translated into action plans in order to make the resultant actions more effective and impactful and to secure greater commitment from managers and team members.
5. Review the metrics and engagement indices to ensure that they are more representative of the true levels of engagement within the organisation.
6. Pay particular attention to leadership, values and communications and to the ways that managers influence perceptions.

Our final recommendation is to reflect on the learning shared within the case studies and, where appropriate, adopt some of the good practice within your own organisation.



2 INTRODUCTION

There is often a disparity between what not-for-profit organisations' employee engagement results say and the reality in the workplace. Organisations with a strong sense of purpose might boast high employee engagement scores, but that doesn't necessarily translate into engagement with the organisation per se. Employees with high levels of intrinsic motivation are commonly engaged with the cause, but not necessarily the employer.

In response to this, the Engage for Success not-for-profit Thought and Action Group was established, with the following aims:

1. Engage employees beyond their organisational mission
2. Establish measures to more accurately reflect genuine employee engagement in the sector
3. Share ideas for voluntary and other sector organisations to enhance their own employee engagement practice
4. Create debate around the subject of employee engagement, leading to further ideas and interest in the topic.

The ambition of the group is to improve employee engagement practices in members' own organisations (and in turn positively impact the organisation and its workforce), and also to advocate for positive change throughout the sector.

The purpose of this toolkit is to share some of the learning.

The intended audience is not just Human Resource/Employee Engagement/Organisational Development/Internal Communications professionals, but also voluntary sector leaders and anyone who can help drive better employee engagement practice.



3 BACKGROUND

More than 40 organisations representing tens of thousands of staff employed in the not-for-profit sector have been involved in the work of the Engage for Success (E4S) not-for-profit Thought and Action Group (TAG).

In the UK, around 827,000 employees work in the UK not-for-profit sector and over 14 million people are estimated to volunteer once a month. Workers are often drawn to the mission and therefore arrive for work with high levels of intrinsic motivation.

If you share the opinion of The Stanford Social Innovation¹ review that ‘compared to the corporate world, the non-profit sector is underfunded, understaffed, under-resourced and under-trained’, then the need for genuinely engaged employees in this sector is even more critical.

E4S is a growing, dynamic, voluntary movement promoting employee engagement as a better way to work. It benefits individual employees, teams and whole organisations.

E4S wants everyone working in the UK to want, and be able, to give their best each day, so that each day is a great day at work, and so that workplaces in the UK are thriving, growing and developing through the commitment, energy and creativity of the people that work in them.

E4S describes employee engagement as a workplace approach resulting in the right conditions for all members of an organisation to give of their best each day, committed to their organisation’s goals and values, motivated to contribute to organisational success, with an enhanced sense of their own well-being.

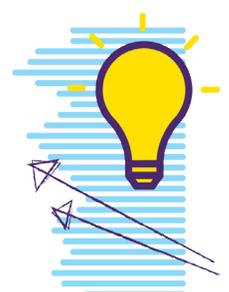
Although there is no ‘one size fits all’ approach and no master model for successful employee engagement, four common themes emerged from David MacLeod and Nita Clarke’s extensive research captured in Engaging for Success². Taken together, they include many of the key elements that go to make successful employee engagement.

These four enablers of engagement have proved to be useful lenses that can help organisations assess the effectiveness of their approaches:

- Strategic Narrative

Visible, empowering leadership providing a strong strategic narrative about the organisation, where it has come from and where it is going.

827,000
Employees
work in the UK
not-for-profit
sector



1 Stanford Social Innovation review, What business execs don’t know – but should – about nonprofits, 2006

2 Engaging for Success, David Macleod and Nita Clarke, 2009

- Engaging Managers

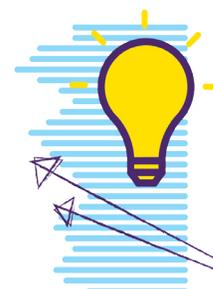
Engaging managers who focus on their people and give them scope, treat their people as individuals and coach and stretch their people.

- Employee Voice

Employees have a voice throughout the organisation, for reinforcing and challenging views, between functions and externally. They are seen not as the problem, but rather as central to the solution, to be involved, listened to, and invited to contribute their experience, expertise and ideas.

- Integrity

Organisational integrity means the values on the wall are reflected in day-to-day behaviours. There is no 'say-do' gap. Promises made are promises kept, or an explanation is given as to why not.



4 FINDINGS

ENGAGEMENT BEYOND THE MISSION

In late 2014, the not-for-profit TAG undertook a survey¹ of employee engagement practice in the not-for-profit sector. The survey was administered by Cerus Consulting and 20 organisations provided a response. The overall findings led to the hypothesis that Employee engagement results in the not-for-profit sector are not representative of genuine engagement levels. This has since been tested with a large number of other organisations in the not-for-profit sector, debated at a sector HR conference², summarised in an article on HR Ville³ and discussed on radio shows⁴. The findings have consistently resonated.

While the majority of respondents believe they are on the journey from treating engagement as a transactional process to a highly transformational one, 35% believed that they were still at the transactional end of the spectrum.

The majority used some form of survey to measure engagement; of those that did, two thirds used an external provider. 45% Surveyed their employees at least annually and 55% undertook biennial or less frequent surveys.

Pride, loyalty, advocacy, discretionary effort and overall satisfaction were the indices most commonly used to measure engagement levels.

Engagement scores ranged from 30% to 90%, with most frequently occurring scores in the 80-90% range. However, only 25% of respondents believed that the measures of engagement provided by their survey was an accurate reflection of the true level of engagement within their organisation. 65% Believed that it was overstated.

The distribution of responses to statements regarding pride, loyalty, identification, advocacy and discretionary effort indicated that employees responded much more positively to statements about the cause than the organisation.

Regarding the four enablers of employee engagement, 60% believed that their organisation provided a strong strategic narrative. 45% believed that their organisation had strong values & behaved with integrity at all times. Only 35% rated their organisation highly as providing strong employee voice and a miniscule 15% believed that managers understood employee engagement.

65% of respondents felt they were effective in communicating survey results back to employees, but only 40% believed their organisation was effective in taking actions on survey results.

A miniscule
15% of
employees
believed that
managers
understood
their role
employee
engagement

65% believed
that their
engagement
score was
overstated!

1 Engage for Success not-for-profit survey report, Cerus Consulting, November 2014 (single-responder)
 2 Strategic People Conference 2015, Agenda Consulting
 3 Weighing the pig, HR Ville, Martyn Dicker, 12 November 2015
 4 Engage for success radio show, February 2017 and March 2014, Martyn Dicker



A separate report⁵ by Agenda Consulting in 2013 explored how engagement in the not-for-profit sector could best be measured and which factors have a strong impact on engagement in this sector in the UK. Three engagement questions were used:

1. I would willingly put in extra effort in order to help the organisation
2. I am proud to tell people that I work for this organisation
3. I would wholeheartedly recommend the organisation to others as a good place to work.

Extra effort and pride were reported particularly high, medians of 87% and 83% respectively. Good place to work stood at a lower median score of 73%, and this is of particular interest as it is the question that the statistical models demonstrated as being the best measure. This measure is the most demanding/discriminating and most influenced by organisational factors – a key tenet of employee engagement. A multiple linear regression model was then used to explore the relative impact of 10 factors and ‘good place to work’ results. Perceptions of leadership, values and communications were found to strongly influence ‘good place to work’.

A further study by The Centre for Effective Philanthropy⁶ found:

1. Foundation staff members are most satisfied in their jobs when they feel empowered in their day-to-day experiences at work. Feeling empowered is more important for satisfaction than other dimensions, such as perceptions of appropriateness of pay or workload.
2. For staff members to feel empowered, they need to believe that management communicates a clear direction for the future, that they are working in alignment with the CEO and board, that the foundation cares about them, and that their performance reviews are fair and helpful.

Research published in the Journal of Economic Psychology⁷ has shown that working in not-for-profit organisations significantly increases individuals’ satisfaction with their jobs despite lower incomes. This is in part explained by psychological factors such as the alignment between organisational mission and personal values.

5 Employee engagement in the UK third sector, Agenda Consulting, October 2013

6 Employee Empowerment - The key to Foundation staff satisfaction, The Centre for Effective Philanthropy, 2012

7 “. . .Do it with joy!” – Subjective wellbeing outcomes of working in non-profit organizations Journal of Economic Psychology Martin Binder, Bard College Berlin, March 2016



Shadow prices peg this effect at around £22,000 (i.e. you would need to pay a private sector worker this additional sum to equal the overall life satisfaction of a not-for-profit worker).

The positive effect can be explained by not-for-profit sector employees enjoying their day-to-day activities more, being (effectively) happier and feeling they are doing something useful with their lives.

While many studies found positive effects on average job satisfaction of non-profit workers, this study extends this effect to life satisfaction more generally.

Many external studies have shown that volunteering is beneficial for one's health and wellbeing, but this particular study extends that to those who work for pay in the not-for-profit sector. Working in this sector is good for your health!

Shadow prices
peg this effect
at around
£22,000 per
annum.





5 BEST PRACTICE

EMPLOYEE ENGAGEMENT MEASUREMENT, STILLAE LTD

Talking to your employees and getting a “feel of a place” is obviously good, but it is impractical to do so at scale, is subjective and potentially misleading and is susceptible to human biases. Surveys should provide a much more reliable view if done well (with consistency, objectivity and comparability). Confidentiality must be guaranteed. Any perceived lack of confidentiality creates a risk that not all participants will feel comfortable replying honestly (undermining credibility of the results).

Good practice requires:

1. Decent methodology and response rates
2. Good analysis
3. Effective communication of results
4. A systematic approach to action planning, with clear accountability

A combination of 3+ questions can be used to create an engagement score, with the focus often being on overall satisfaction, advocacy and intention to stay. On the basis of the earlier findings, it is important to not overstate engagement scores as a result of the impact of engagement with the cause or mission, rather than the organisation (e.g. ‘recommend as a place to work’ rather than ‘recommend the cause’).

An example employee engagement index is made up of the following questions:

1. Overall I am satisfied with X as a place to work
2. I see myself working for X for the foreseeable future
3. I would recommend X to my friends as a good place to work
4. I understand how my role contributes to achieving X’s business outcomes
5. I feel valued and respected for the work that I do
6. I feel motivated to give my best to X

It is suggested to keep the total number of questions in an employee engagement survey to below 50 and keep response times to under 10 minutes.

Negatively worded questions should be avoided. If they are used, then identify them very clearly in the reporting.

For honest responses to be given, confidentiality is a necessity.

Use 3+ questions.

Focus on overall satisfaction, advocacy and intention to stay.

Be mindful of how questions are worded to ensure results reflect engagement with organisation i.e. ‘Would you recommend as a place to work?’ rather than ‘Would you recommend the cause?’

Aim for a focussed set of <50 questions and to keep response times at 10 minutes.



TOOLS & TIPS

Four sources of questions should be considered:

1. Stakeholder priorities – purpose, values, key initiatives
2. Employee feedback and suggestions
3. Past surveys – known drivers of engagement and/or topics being worked on.
4. External sense-check – to not miss out drivers which have been identified elsewhere.

In reporting the results, it is best to group questions into themes and keep engagement outcomes separate. Try to avoid percentage ‘positive reporting’ (i.e. the percentage that agree to the question plus the percentage that strongly agree), and instead show the average (mean) instead. This ensures that all responses, as given, are taken into account. It also makes it much easier to check for statistical significance of differences. If there is a preference to provide responses as a percentage, which is common, the mean figure can simply be converted.

It is best to exclude non-responses from all calculations. Benchmarks can be a useful yardstick, but they should not be what you are reaching for. It's best to set a three to five year employee engagement goal, but benchmarks should not be your target. To undertake this, you need to be clear as to your current state and your destination state.

Comparing scores across questions can be a case of comparing apples and pears! Imagine changing your ‘trust’ question from ‘*I have total and complete trust in our leaders*’ to ‘*Our leaders are trustworthy*’. You would get higher scores despite no change in trust, even with the same scale!

The overall organisation results provide the simplest internal benchmark, with divisions / department / regional results compared to the overall score.

In presenting the results, it is likely that you will want to tailor the reporting style to the audience.

1. Leadership – candid; warts and all!
2. Overall organisation – honest but constructive
3. Local results scorecard – practical and concise. It may be best to use a RAG (red, amber, green) system to flag best and worst and allow them to move on quickly to dialogue.

Avoid negatively worded questions.

Consider the following four sources of questions: Stakeholder priorities, employee feedback and suggestions, past surveys, external sense check.

Avoid percentage positive reporting.

Exclude non-responses from all calculations.

Create a 3-5 year employee engagement goal by taking into account the trends and progress to date as well as the appetite of the organisation to sustain or accelerate progress.

Compare divisions/ department/regional results with overall organisational results for simplest internal benchmark.

Tailor reporting of results to specific audience.



TOOLS & TIPS

In presenting the leadership results, five perspectives should be considered:

1. Current results – related to expectations / milestones
2. Change over time – both most recent change and longer-term trends
3. Topics from the survey – themes first, with questions providing the detail
4. Parts of the organisation – divisions and functions, job families, seniority
5. Programme health measures – momentum, action planning, etc.

It is also critical to develop a compelling narrative for the leadership results, ensure your provider (if you use one) completes a systematic review (so the unexpected is not missed), help increase ownership of results by breaking-down data to team and individual manager level, identify topics for deeper-dives and gain the CEO's input and sponsorship via a pre-meeting.

Five perspectives to consider when presenting leadership results: Current results; change over time; topics from the survey; parts of the organisation; programme health measures.

Develop a compelling narrative and have a systematic review conducted.



6 THE CASE STUDIES

One of the aims of this toolkit is to share examples of best practice approaches to engagement. Some fascinating insights are shared within the following case studies from British Red Cross, CAFOD, Cancer Research UK, CIPD, Jewish Care, VSO and WaterAid. All of the case studies featured contain multiple transferable tools and tips that could benefit strategies adopted by organisations both within the not-for-profit sector and beyond. They are presented through the lens of the four enablers that Engage for Success found drive engagement as first proposed by David Macleod and Nita Clarke.

BRITISH RED CROSS

EMPLOYEE VOICE

In 2013, the British Red Cross (BRC) made a shift away from traditional measurement of staff and volunteer satisfaction to explore levels of engagement. This decision was made as a result of the mounting evidence that engagement was a better predictor of retention, performance and other tangible organisational outcomes.



BRC recognised that whilst the survey could tell them ‘what’ people were thinking and feeling, it could not inform ‘why’ or tell the stories that would enable them to design the best way forward. In order to meet this need, the BRC decided to introduce the strengths based approach of Appreciative Inquiry (AI). This method is different from traditional models of problem solving: rather than encouraging people to focus on ‘what’s wrong’ and then trying to fix it, people are encouraged to think about ‘what’s right’ and how we can do more of it. The approach is also creative and collaborative, and is helpful in shifting from a perspective of blame and helplessness to one of control and shared responsibility.



TOOLS & TIPS

The BRC is a dispersed organisation, and in order to reach staff and volunteers across all of their geographical areas, they recognised the need for trained facilitators in the AI technique across the UK. They worked with a specialist consultancy who advised and supported in the design and delivery of a training programme for 80 facilitators across the country. All facilitators were given resource packs, and a number of outline templates for sessions which they could use if they wanted. They were also encouraged to be creative and adaptable with the groups they were working with. These individuals were then able to deliver 132 sessions within their areas. In total, 558 staff (14.6%) and 176 volunteers (0.8%) took part in the sessions.

The ideas and suggestions from the AI sessions were developed into six graphical posters that displayed these aspirations in a visual and assessable way; creating a vision from which actions could be planned, both centrally and within individual teams and departments.

Whilst all areas/departments had the opportunity to take part in this initiative, the take-up was variable. To understand this better, they invited facilitators to take part in focus groups that supported a review of the approach. The results of these focus groups function as enabling factors needed for the AI sessions to be a success. One such enabler was managers and leaders as pivotal to success, with three key roles (supporting AI facilitators in having the time and resources to deliver sessions and recognising their contribution; encouraging staff and volunteers to attend; following through on the actions that result). Also, facilitators from a range of roles were effective. It's helpful for facilitators to have an understanding about participants and to adjust their session design to participant reactions, but to withhold preconceptions. Acknowledging cynicism and appreciating that this can be a challenging new way to look at a situation can help to set the scene. Facilitators need to retain positivity, whilst showing authenticity and not becoming defensive. A co-facilitator can help with peer support, especially if a group is challenging. Learning & Development staff were better placed than some in terms of taking forward actions and creating sustainability, but non-Learning & Development staff/volunteers had the advantage of appearing more detached from management (in terms of creating a safe space). Building a safe space and rapport quickly is important to facilitate open conversations – noting that the discussion will be confidential helps. It was also found that the relevance of content helped to maximise participation – for example using themes selected by participants and linking to local survey results.

Holding meetings off-site, creating a relaxed and informal atmosphere and providing refreshments were all useful in encouraging open and honest conversations, and linking sessions to other events (e.g. away days or team meetings) helped to get around the issues of time, organisation and geographical disparity.

In 2014 the AI approach was introduced at relatively short notice. In some cases this made it more difficult for individuals and teams to fit

Achieve optimal outreach by training a geographically dispersed set of facilitators.

Showcase ideas voiced by employees creatively to ensure exposure and promote action.

Ensure that reviews are conducted of the effectiveness of interventions.

Maximise the strategic involvement of managers and leaders.

Aim for diversity in the backgrounds of facilitators, the ability to provide an attuned response to participants, and good rapport building capacity.

Consider holding meetings off-site for a more formal and perhaps logistically simpler solution.



it into their work among other priorities. Including this activity within the organisational planning process will enable workloads to be balanced. It was noted that using the terminology ‘appreciative inquiry’ on its own could be confusing, sessions needed to be clearly titled - something like ‘conversations about positive engagement’. Marketing the sessions using metaphors was also found to be helpful (e.g. ‘a journey on the engagement train’). The length of session was dependent on the participants and areas, but two to three hours was viewed as the minimum for an effective session. Being transparent and clear on expectations of the process and what will happen with the collected data is important. Demonstrating that actions have been taken and followed through is important and this responsibility needs to be shared.

One of the central benefits to using AI is that this method is fundamentally engaging in itself. It enables people to have a voice and control over decisions which impact upon them.

BRC found that where AI was used successfully, the impact has been seen both in terms of cultural changes and in the implementation of concrete tangible actions. The culture change can be expressed in terms of four interlinking elements:

1. A new way of connecting: relationships were built up and down/across the organisation which have lasted beyond the AI sessions themselves; good practice shared; conflict reduced and a greater sense of mutual understanding. (e.g. “Openness, it enables dialogue and conversation. One question leads to a whole big conversation.”)
2. A new way of thinking: sessions created a space where people could have their say in a positive way and see challenges from a new angle; where a shared vision emerged, from talking about ‘the organisation’ to ‘our organisation’ and myths and organisational rumour were countered (e.g. “Looking at the organisation in a positive way. Acknowledging that we have some great stories to share.”).
3. A new way of acting: taking a focus on solutions generated proactivity and ownership of goals. A positive atmosphere stimulated change driven from the grass-roots which was both empowering and effective (e.g. “forces you out of a downward spiral of negative thinking. Helps move forward – practical solution forced”).
4. A new way of working: facilitators developed appreciative techniques, especially the use of ‘appreciative questions’ that they’ve used beyond people engagement sessions. These ranged from 1-to-1 meetings, away-days and strategy planning sessions, personal reflection and development; to improving relationships outside of work. Thus, the potential scope and impact of AI is far beyond its original intended purpose (e.g. “I love a good process, so like the process and principles and having a structure/ framework to work within.”).

WATERAID



TOOLS & TIPS

ENGAGING MANAGERS

WaterAid has long recognised the pivotal role that engaging managers play as one of the four key enablers of employee engagement. A significant number of questions in their biennial global employee engagement survey focus on this.



In 2014 the organisation rolled out ‘Managing@WaterAid’ – a bespoke in-house management training programme that has now been successfully delivered to more than 200 managers in the UK and across its entire network of country and regional offices around the world. Although focusing on a broad range of core management skills, course content can easily be mapped to the various aspects of the ‘engaging managers’ enabler – namely clarity of what is expected (including stretching objectives, appreciation, feedback and coaching), treating people as individuals (with fairness, respect, a concern for employee well-being and personal development), and ensuring that work is designed efficiently and effectively.

WaterAid knows the potential disruption that can be caused by changes to line management and therefore, turnover among managers was a particular challenge to achieving a stable cadre of engaged and engaging managers. Managing@WaterAid aims to address this by not only providing training and development opportunities for this group (which will encourage people to stay), but also in creating a middle management ‘culture’, and a consistency in practice and approach which will ease management transition when it does occur.

Clarity of expectations, treating people as individuals and ensuring that work is designed efficiently and effectively should be central to interventions.



TOOLS & TIPS

While it can be challenging to measure the direct impact of this and other efforts targeted at engaging managers, the anticipated benefits were clear. More engaging managers are a key factor in creating more engaged staff – leading to lower turnover, greater discretionary effort, higher motivation, and a clearer link between the work of individuals and the overall vision of the organisation.

Managing@WaterAid has been running for over two years and is firmly embedded as a key part of WaterAid’s learning and development offer. In an evaluation study conducted in late 2016, three in four participants reported a direct link between their participation in the programme and an increase in the engagement and motivation of their teams. WaterAid’s approach to management development was also highlighted as a key factor in their 2016 Best Companies index, which saw them ranked as the 6th best not-for-profit to work for in the UK.

In their 2016 global employee engagement survey, WaterAid’s engagement index (calculated on the basis of three of the survey questions) was 89% - an increase of 5% on the 2014 survey. The survey was based on a 96% global response rate.

WaterAid’s recommendation for other organisations is to ensure that any management development mechanisms include a clear focus on the role of managers in motivating and engaging their teams.

VSO

EMPLOYEE VOICE

VSO has helped boost employee engagement through the use of technology. The goals were to have the necessary technology to undertake jobs well, use technology innovatively and access/share programme information.

Laptops were provided to enhance satisfaction with remote working, a new leadership development programme was launched (with self-directed virtual action learning sets, remote coaching and an on-line forum), ‘Chatter’ became the central point for sharing, collaborating and socialising, new on-line courses were introduced and an employee-led action group reviewed the engagement scores, identifying elements they could influence and took action.

Additionally, ‘global jams’ (discussion forums) were introduced and a global buddy network was extended.



Measure the impact of participation in programmes introduced on engagement.

Harness the power of technology to increase engagement.

Ensure engagement interventions are comprehensive in their reach.

Enable employees to collaborate and support each other.

CANCER RESEARCH UK

Cancer Research UK (CRUK) is the world's leading cancer charity dedicated to saving lives through research. They have the aim for 3 in 4 people to beat cancer by 2034 – an ambitious goal, which can only be delivered through their people driving momentum and performance.

CRUK conducts an employee engagement survey every 18 months, and historically has overall engagement scores in the 80's. Indeed, engagement at CRUK has always been high by conventional measures, such as pride and care, but the organisation was keen to ensure that this was reflective of engagement with the organisation itself, as well as with the mission.

EMPLOYEE VOICE

CRUK understands the importance of employee voice, and took a holistic approach to ensuring information around engagement results were cascaded effectively across all levels to make the results feel as real and relevant as possible for people. Historically, results were led and driven by HR. However, it felt important this time round that results were 'owned' by the business. CRUK also wanted to explore the survey results in detail as the survey itself could only provide a 'snapshot', and many results required more exploration to ensure actions really addressed the concerns raised.

Following feedback from their first survey, they built a tailored cascade pack, which featured:

- A recommended approach for running local engagement discussion sessions using survey results, including timings, activities and 'top tips' for getting people motivated to take action.
- A simple-to-use presentation template to capture results, surprises and highlights, as well as an action planning template.
- An 'inspiration guide' containing suggestions for how lower engagement scores could be addressed including external good practice, HR advice and examples from teams across the charity who had addressed similar challenges in previous years.

The organisation also provided tailored reports to teams to highlight how scores had moved since the last survey, and insight from observations on priority areas. In building these tailored reports they used a network of Engagement Leads to sense-check plans and recommendations. This approach enabled them to provide teams with one clear report rather than lots of different cuts and breakdowns of the data, which allowed for easier interpretation of scores and more meaningful action to be taken.

A focus on employee voice was also made through the appointment of Engagement Sponsors in each directorate, which placed responsibility for encouraging uptake and following up on activity in their areas.



TOOLS & TIPS



Ensure engagement is presented as a wider business matter, not just an HR concern.

Invest sufficient time conducting a thorough examination of results and on making a plan of action.

Provide all tools necessary to support completion of the task.

Provide insights into data collected.



TOOLS & TIPS



Because they were not 'HR', it meant the business had greater ownership of the data and action plans. Engagement Sponsors also provided a more critical context so that when results were presented they could link insight with other initiatives already being progressed. However,

this was not a completely 'hands off' approach, as HR Business Partners and Advisors were also involved in these conversations. The approach taken equipped leaders with the relevant information needed to have more meaningful conversations about staff engagement, and encouraged local ownership. It also enabled good practice to be shared; some managers took ideas from other teams and used it locally to great effect.

The process was not without its challenges. Creating the tailored reports was time consuming. There wasn't the budget to commission the reports, so CRUK created them manually. However, this provided the benefit of close contact with the data, and the opportunity to identify cross-cutting themes and insights which were useful to inform central activity and guide local managers more effectively. Another challenge was managing the expectations of the business, which was keen to see the survey results as quickly as possible. To respond to this, they cascaded the results in stages; providing overarching data first, then by directorate, and finally, team results.

Another key challenge faced was getting people to prioritise activity - there was an inclination towards wanting to tackle everything or becoming obsessed with 'small' improvements. This meant people were more likely to become dispirited when results did not significantly improve, or were at risk of feeling that engagement activity was too distracting from business as usual. They therefore, took some time with the second survey to emphasise which areas really needed improvement, asking people to only identify 1-3 areas for focus, and stressing that some areas need little or no action - just maintenance. They found that honesty, rather than insisting on engagement activity, was critical to maintaining stakeholder interest and commitment.

CRUK recommends the following for other organisations:

- Provide guidance to help managers run engaging workshops to discuss results rather than relying on the survey data alone.
- Develop an 'inspiration' toolkit with external and internal ideas on how to tackle common challenge areas.

Have inclusivity at the heart of your approach.

Invest time in getting close to your data

Present increasing engagement as a process and manage expectation



- Create local 'Engagement Sponsors and Leads' to help coordinate activity
- Be honest with the business, and don't insist on too much engagement activity. Focus on a few meaningful things that matter rather than chasing small % improvements.

ENGAGING MANAGERS

Building on this, CRUK has recognised the significance of engaging managers as one of the enablers of employee engagement, and the role that they play locally to really drive engagement within teams. There was a huge focus on managers having great conversations and driving action. Many steps were taken to make it an all-inclusive CRUK operation. From senior leaders to line managers of smaller teams, leadership was measured at all levels.

CRUK wanted to help managers in developing an open and transparent culture where good conversations were the focus. It was important to the organisation that managers really encouraged and modelled the behaviours that underpin their beliefs. The outcome of this focus on managers was to be measured as part of the staff engagement survey. This section was called Manager Insight.

Manager Insight is a set of 12 questions which involved the identification of the desirable leadership behaviours which were then split into hard and soft skill sets groups. Survey respondents were asked to think about their direct line manager when answering these questions. It was important that the questions could be externally benchmarked to ensure that the manager performance was comparable more widely outside the organisation. Embedding this across the organisation took an inclusive approach, again involving the appointment of Engagement Leads at grass roots who drove participation, as well as Engagement Sponsors at a head or director level who championed engagement at leadership team meetings. This was a key part of the strategy to get leadership buy in, as well as involvement from the wider organisation. Survey questions were re-examined, which involved the extended leadership team, the Executive Board as well as the wider organisation via employee validation group. This also encouraged their buy-in and ensured all were comfortable and understood the questions asked.

Managers who received four or more responses from their direct reports received a Manager Insight scorecard with a dashboard to show the percentage distribution of responses. Scores were also shown for each Manager Insight question as an average number, which was helpful for quick analysis and setting benchmarks. Shortly after the engagement survey closed, a wide range of support was provided to managers, such as targeted coaching, spotlight sessions, masterclasses, a manager

Ensure managers promote desired behaviours and value conversational leadership

Involve everyone to maximise drive behind the initiative



toolkit and resource library as well as action learning sets. Alongside this, a pulse survey tool with the 12 Manager Insight questions was made available so managers were able to check in on their progress throughout the year. This also meant that aspiring managers and those who didn't receive a scorecard the first time had the opportunity to gain feedback. The HR Business Partners and Advisors continued to support managers with structuring feedback sessions with their teams.

CRUK continues to value employee voice as another key enabler of engagement by displaying the full set of responses in results, presenting all five possible responses: strongly agree; agree; neutral; strongly disagree; disagree responses (as opposed to the common practise of merging scores). This was done to make sure that attention was drawn to all shifts of opinion as a jump from 'agreeing' to 'strongly agreeing' is equally as important as the shift from 'neutral' to 'agreeing'. Reporting results in this comprehensive way is recommended practice as it gives indications of significantly changing feelings, in a way merging scores wouldn't.

Further feedback provided to the team has shown that managers liked having this level of detail and actively used it as a springboard for having good conversations with their team.

The organisation has seen a steady increase in survey participation year on year.

CRUK make the following additional recommendations:

- Putting a focused lens on managers can help drive engagement at a team level and help the organisation to understand the role that they play.
- Ensure that employees at all levels of the organisation are aware of and bought into the idea. Communications should be targeted and tailored for each audience so that emphasis is made on the key reasons of why this is important to them.
- Provide follow up and support for managers afterwards. This can include an extended programme of spotlight sessions, action learning sets, 360 feedback tools as well as targeted coaching programmes, all of which help with improving focus areas.

Present an accurate portrayal of engagement by conveying scores given for all points of the scale

Deliver comprehensive feedback

JEWISH CARE



TOOLS & TIPS

INTEGRITY

Jewish Care is the largest European social care organisation serving the Jewish community in the London and the South East. It runs more than 70 centres and services, touching the lives of 10,000 people every week and employing 1,500 staff and 3,000 volunteers.

When the current CEO was appointed in 2004, his aspiration was to become the best Health and Social Care organisation in the country and to work together to become a true learning organisation and a voice for the sector worthy of winning accolades. He knew that a values-based and led organisation was at the heart of making this a reality.

Back in 2005, the organisation identified several areas for improvement relevant to employee engagement including staff sickness and turnover rates, increasing the average length of service, introducing benchmarks, addressing culture related issues, the need for greater collaboration and increasing participation in the staff survey. A strategic review indicated the need for a new set of organisational values. The chosen values introduced in 2007 were: Caring, Excellence, Inclusive, Enabling, and Integrity. “Values in Practice” workshops were introduced for all staff focusing on how to live more of the organisational values more of the time. The workshop encouraged staff to assess their attitude, invest in others’ “relationship bank accounts” more often, explore how best to listen, be a better team player and to be aware of where they are on their ‘spiral of positivity’. There were also “Leading by Example” sessions for team leaders, as well as a coaching programme. The top 30 senior leaders of the organisation, including the CEO, delivered the workshops to over 800 staff and volunteer co-ordinators over a two year period. A values-based leadership programme was designed for senior and front line leaders with a focus on leading themselves, their team and the organisation (in line with the values and strategy). Each leader had 1-1 coaching sessions to support learning and a team-based organisational project.

By 2012 there was noticeable improvement. Sickness fell from 5%+ to below 3%, as did turnover, from 29% - 30% to 12%. Average length of service doubled, and participation in the staff survey tripled. This was soon followed by Jewish Care being rated in the Sunday Times Top 100 best places to work in 2011 and 2012.

ENGAGING MANAGERS:

The organisation continued to make improvements, conducting another strategic review involving reflection on customer feedback and sourcing external support. A “Strategy Safari” was held with the top 30 senior managers where, they worked to define the organisations’ new purpose of ‘meaningful lives’, and three strategic goals of promoting wellbeing, enhancing value and strengthening the community. This activity gained

Have a vision and establish how to achieve it.

Identify the key areas needing improvement.

Take an inclusive approach ensuring the involvement of staff at all levels whilst making sure interventions are tailored.



TOOLS & TIPS

the buy-in and engagement of the top three levels of leaders in the organisation. As part of the strategic work of the group, the values were again reviewed and refreshed with the introduction of a focus on creativity. An intensive strategy roll-out programme was held over a two-week period with over 1,000 staff and volunteers, from the Chairman down. The main message was to 'remember you make the difference'. Exercises focused on creativity, understanding what is meaningful and encouraging collaboration. The CEO and HRD took part in all sessions.

Secure the buy-in of senior leaders

Regularly reflect on continued relevance of values and refresh as necessary.



This sustained investment in engagement was again rewarded in the best places to work rankings in 2013, this time by Jewish Care winning the “Skills for Care Accolade” in the category of best employer of over 250 staff. From 2013 to 2016 engagement was measured externally. The survey consisted of 50 set questions and two open text questions. Correlation analysis was also conducted with sickness, turnover, Net Promoter Score and customer satisfaction. The 2014 staff survey indicated extremely positive improvements. 95% of staff felt clear about the values of Jewish Care, 93% either agreed or strongly agreed that the organisation was run on strong values/principles, and 92% said they would be willing to put in extra effort to help the organisation. The 2016 figure for participation in the external staff survey rose to 71%, and 88% of engagement had been maintained for three years. The organisation also won the Investors in People gold award, as well as the Agenda Consulting engagement award for 2015 and 2016.

Ensure news of success travels.



Jewish Care makes the following recommendations:

- Partnership between HRD and CEO
- The integration of values and objectives into all people and organisational processes
- Involving the top 80 in design and delivery of vision, values, purpose and strategy
- The positioning of employee engagement as fundamental to the delivery of strategy
- Providing support to leaders in areas that are less engaged
- Relentless focus on reflection and improvement
- Externally sourced survey provider and benchmarking
- Showing how you have listened to and acted on your survey results
- The earning of awards and ensuring people know about them, both inside and outside the organisation.

CIPD

In 2014, the CIPD conducted an organisational effectiveness review. One of the outputs was the production of a heat map across a range of workforce and workplace factors. Areas such as culture and environment ranked positively while leadership, processes and strategy ranked less favourably. Following a realignment to the structure of the leadership and various departments to improve organisational focus, it was important to re-energise and engage people in the organisation so that they could continue to deliver a great member experience and champion the CIPD's mission of better work and working lives.

EMPLOYEE VOICE:

The organisation appreciates the value of employee voice as a key enabler of employee engagement. Small project teams known as sprints were formed to identify some of the barriers to effectiveness including culture, processes and strategy, and to come up with solutions. Sprint teams consisted of a diverse group of people from across the business covering all types of roles, levels, tenure etc. Using agile work methodology, the sprint teams were set 90-day objectives and key

Recognise the power of engagement in creating a productive workforce.

Have a diverse group representative of several levels of the organisation identify the barriers to engagement for more comprehensive results.



TOOLS & TIPS

results to achieve, with the understanding that it didn't need to be perfect – 80% was good enough, this was about pace of successful delivery. The sprint teams were able to set their own targets and make recommendations to the executive team. By working in this way, employee voice was strengthened as people who would usually have been focussed on their day-to-day roles were able to interact with others across the business, as well as share directly with the Executive Team. The group themselves were integral in terms of interacting across the organisation and 'working out loud' to ensure input from every level.

STRATEGIC NARRATIVE:

Strategic narrative was also a focus. One of the teams addressed the strategy and how connected people felt to it. It developed collateral in conjunction with the strategy team which demonstrated how individual objectives contributed to the overall business strategy. They also used storytelling to support better understanding of the strategic narrative. At the end of each 90-day sprint, the teams held interactive events to share results and gain input. Using the 90-day objectives methods the teams were able to deliver quick, visible and meaningful wins. For example, removing the outdated dress code policy to signify the culture CIPD wanted to create, along with workplace rules that didn't reflect a trusting relationship between leadership and the wider business.

Much of the impact this had on engagement was demonstrated through people's behaviours. For example, through collaborative and focussed conversations and interactions taking place at the all-staff roadshow. This all staff roadshow was the CIPD's first large-scale internal engagement event, and ensured messages landed clearly with everyone in a way that stimulated excitement; buy-in was very important. The success of this event really demonstrated to employees how far the organisation had progressed in a short space of time. The organisation also saw an increase in intranet usage and comments relating to the Ways of Working programme, 90 visitors to the Ways of Working events and verbatim feedback from Investors in People.

As the organisation continues to change, the CIPD is beginning to use an employee pulse survey on a regular basis to check in on engagement. By using a fast and easy-to-use online survey tool, the CIPD will be able to build up trend data that can be analysed by looking through different lenses, such as department, job grade, age and length of service to better understand the impact of business change and environment on their people in the business.

Involve those responsible for the results in the setting of objectives to encourage ownership and collaboration.

Ensure the strategic narrative is modelled by management.

Reflect on all achievements, not just in areas responsive to traditional measurement.



CAFOD

CAFOD is a faith based international development agency working with some of the world’s poorest and most disadvantaged people. It knows that the work it does is about people; the people it serves, the people who support it and all its employees, without whom the work wouldn’t get done.



In 2015, with the intention of enabling CAFOD to withstand the increasingly volatile environment it was operating in, and reduce core costs to focus more funds in its work in the developing world, CAFOD undertook a whole-scale change programme entitled: “Towards 2020”.

One of its main objectives was to increase employee engagement. It was aware that in the voluntary or NGO sectors, whilst levels of engagement with the cause or mission are normally relatively high, this doesn’t necessarily equate to high levels of engagement with the organisation, and this was something it sought to address.

EMPLOYEE VOICE:

CAFOD started by looking at staff feedback about some of the cultural and behavioural issues they wanted to see addressed. The Leadership team’s views were sought and CAFOD’s Learning & Development Manager and Internal Development Specialist developed a People Framework based on this feedback. The intention was that staff would see that this was a collective effort based on listening to what they had said.

Recognise the strength of engagement in the success of wider organisational goals.

Involve everyone in the identification of areas to be addressed and demonstrate how opinions have been listened to and acted on.



TOOLS & TIPS

STRATEGIC NARRATIVE:

The framework also became the frame of reference for CAFOD’s “People & Performance Group”. The purpose of this was to develop some of the other enablers of employee engagement such as enhancing leaders’ and managers’ engagement skills, giving employees more of a voice, increasing the visibility of the Leadership Group and helping them to provide a strong strategic narrative to give staff a clear sense of CAFOD’s overall direction.

The purpose of the People Framework is to enable everyone at CAFOD to have a common understanding of the behaviours each person at CAFOD needs to take personal responsibility for demonstrating, and to also to remind everyone that every decision and action they take needs to be in the service of the organisation’s vision and values. The framework

Embed engagement interventions into wider initiatives.



is also the basis for developing CAFOD’s overall People Strategy. This strategy describes areas of focus for its People and Performance Group to support the behaviours it wants to encourage in relation to Voice and Communications, Our Experience at Work, Personal Responsibility and Accountability and Leading and Managing. Annual plans for each of the relevant teams in this Group will be based on this Strategy.

Live the values of the organisation.



ENGAGING MANAGERS

After its People Framework was developed, CAFOD worked with Group Heads so that they could organise a time for the Learning & Development Manager and Internal Development Specialist to run workshops, either with the Group Management Teams, their entire Group, or both, depending on what worked best for them. A separate workshop also ran for the Leadership Group. The workshops were tailor-made and explored what people needed to do to make the framework come alive in their settings. They were then tasked with developing an action plan in which they were encouraged to identify areas needing particular attention so that relevant members of the People & Performance Group could then provide suitable interventions and tools.

Common themes coming out of the workshops were fed back to the Leadership Group so they could look at what they needed to do to support this work, or changes that they needed to make at a wider organisational level. CAFOD also developed, and is in the process of delivering, some new tools and interventions including:

- A Managers Toolkit to help Managers engage more effectively with their teams which is also being reflected in existing and new training inductions for Managers
- An Early induction session for new Managers led by a member of the CAFOD Leadership Group and designed to set clear expectations
- Leadership development to help CAFOD's Leadership Group to develop their own performance and behaviours.
- A pulse survey – to get quick feedback on a range of people related issues
- An engagement survey - an innovative and practical approach which looks at some key drivers of engagement such as a sense of togetherness, sense of purpose etc. This is essentially an organisational psychometric tool which will help CAFOD to identify levels of engagement in different parts of the organisation and enable CAFOD to make appropriate interventions where needed. It also supports the work we have already started with our People Framework workshops.
- Our Internal Communications team working more closely with the Leadership team to help them provide a clear strategic narrative.
- Leaders committing to becoming more visible – through regular updates, sharing meeting minutes, attending staff meetings and other related activities.

Ensure approaches are tailored to the intended audience

Provide sufficient support to enable changes to spread across all levels of the organisation.



TOOLS & TIPS

CAFOD understands that establishing pillars of engagement such as organisational integrity is a process. This work started in April 2015, and so far, has focused on putting the foundations in place for ongoing culture change. Over the next months and years, it will continue to develop its people/HR & Learning and Development policies and practices to reflect and reinforce the behaviours that we want to embed in the organisation. Whilst its People & Performance Group will support and drive the work, the aim is to encourage everyone to see that they have a role in creating the culture it wants to see happen.

Head of People & Performance at CAFOD, and key sponsor of this work says: “The level of engagement with the workshops has been amazing with staff really appreciating the opportunity to explore and give more attention to “how things get done” in support of “what needs to get done” – the key learning is that we can’t have a one size fits all model, instead the approach has been to create a general frame of reference and then give CAFOD’s Leadership Group, our Groups and teams a voice and ownership of it, to explore how it works in their particular settings – with our People and Performance Group accompanying them on the journey and providing the appropriate tools and interventions where needed.”

Take the long-term view and understand that sustainable engagement is a journey.

Tailor approaches and ensure they are sufficiently supported.



7 CONCLUSIONS & RECOMMENDATIONS

The study undertaken by the Engage for Success not-for-profit TAG involved a relatively small number of organisations and was not intended to satisfy more comprehensive statistical approaches, but it provided a hypothesis that has continued to be tested for more than three years. There is a clear preference for ‘cause’ over ‘organisation’ and whilst we cannot conclude categorically that employee engagement survey responses are being distorted, we believe that there is sufficient evidence to suggest that many organisations are not obtaining an accurate picture of employee engagement levels.

Further, we conclude that this may well mean that critical aspects of organisational behaviour and practice are being overlooked in the belief that they are not fundamentally affecting engagement when the reality is that people are ‘going the extra mile’ despite the organisation and not because of it. This may be manifesting itself in enhanced levels of performance and service in the short-term but at a price; eventually frustration with organisational practices, burnout and stress will come to the fore with the inevitable consequences of physical and/or emotional withdrawal of effort.

Consequently, organisational performance will invariably suffer as will employee wellbeing – a doubly disastrous outcome not only for employees but for beneficiaries whom the charities aim to serve.

As a result, we have a number of recommendations:

1. Educate managers as to their role in the creation of an engaging environment within their teams and establishing a greater sense of ownership and accountability for survey results and engagement scores.
2. Focus attention on the four enablers of engagement (strategic narrative, employee voice, enabling managers and integrity) with a view to identifying improvements in practices that would enhance effectiveness across each of these key aspects, with a particular emphasis on managers and employee voice.
3. Educate leaders about the importance of engagement, supported by a better understanding of the relationship between employee engagement and other organisational performance indicators, in order to position engagement as a transformational organisational process.
4. Re-examine the process whereby survey results are translated into action plans in order to make the resultant actions more effective and impactful and to secure greater commitment from managers and team members.

Equip managers to make a positive impact on engagement.

Focus on the four enablers of engagement.

Position engagement as a transformational organisational process through spreading awareness of how it relates to other organisational performances indicators.

Review the process of acting on survey results to ensure greatest impact.



TOOLS & TIPS

5. Review the metrics and engagement indices to ensure that they are representative of the true levels of engagement within the organisation.
6. Pay particular attention to leadership, values and communications and to the ways that managers influence perceptions.
7. Reflect on the learning shared within the case studies.

Ensure metrics used reflect engagement with the organisation.

Focus on leadership, managers, values and communications.

Utilise the tools and tips shared within the case studies.

Thanks to all of the organisations that contributed to this toolkit, the initial research, the various Thought and Action Group discussions and authored case studies. Many thanks also to Siobhan Renshaw for providing invaluable coordination and input.

If you would like to join the ongoing work of the Engage for Success not-for-profit TAG, in particular with an interest in volunteer engagement and/or evidence that employee engagement drives improved organisational performance, **visit <http://engageforsuccess.org/>**.

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