



HEALTH AND WELLBEING AT WORK 2022

Case studies



About the CIPD

The CIPD is the professional body for HR and people development. The registered charity champions better work and working lives and has been setting the benchmark for excellence in people and organisation development for more than 100 years. It has more than 160,000 members across the world, provides thought leadership through independent research on the world of work, and offers professional training and accreditation for those working in HR and learning and development.

About the survey

The CIPD's *Health and wellbeing at work* survey, in partnership with Simplyhealth, examines the practices organisations have to support people's health at work. It provides people professionals and employers with benchmarking data on important areas such as absence management, wellbeing benefits provision and mental health. The survey for this 2022 edition was conducted online and sent to people professionals and senior HR leaders in the UK. In total, 804 organisations responded, covering more than 4.3 million employees.

About the case studies

As part of our latest *Health and wellbeing at work* survey, we spoke to two organisations: Leek United Building Society and the Scottish Council for Voluntary Organisations (SCVO). Both have transformed how employee wellbeing is positioned and have put in place a raft of initiatives to achieve cultural change around health and wellbeing. During the pandemic, senior leaders at Leek United and the SCVO have prioritised people's health, wellbeing and safety, but their plans don't stop there. Going forward, employee wellbeing remains a strategic imperative for both organisations and they have much to share in terms of the learning for other employers who want to place wellbeing at the heart of their business operations to enhance their health and wellbeing practices for the future.



Case studies

Health and wellbeing at work 2022

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1 Leek United Building Society

Leek United Building Society is based in the Midlands, but its member base is nationwide. Highly committed to its mutual status with a firm dedication to local communities, this 160-year-old organisation has been seeking to modernise its operations to continue thriving in today's fast-moving financial services world.

An HR seat at the top table

Up until 2019, HR had a peripheral profile at Leek United, explains HR Director Rob Longmore. The function was notably absent from the executive table and, consequently, from executive strategy and focus; a coherent people strategy that linked with wider business objectives did not exist to the level that was needed to truly engage its people. Unsurprisingly, therefore, employee health and wellbeing received little attention, which led to some people challenges in areas such as sickness absence and staff turnover, as well as employee engagement and morale.

The appointment of Chartered FCIPD Andrew Healy as CEO, and the subsequent inclusion of HR on the executive committee, has changed the situation beyond recognition. An extensive consultation exercise with employees, involving more than 50 separate workshops as well as multiple pulse surveys, was initiated to inform the people strategy. The Society has since implemented a transformational programme of initiatives, moving strategic HR to the centre of the organisation's corporate agenda. A core element to this strategy has been a focus on employee health and wellbeing via the Society's employee support programme (ESP).

The five pillars of wellbeing

The Society launched its ESP in mid-2019. The programme would ultimately prove instrumental in ensuring an 'unflinching focus' on the safety, health and wellbeing of staff during the pandemic. The ESP's five key components are:

- **In-house support:** Policies covering all aspects of health and wellbeing were put in place and augmented with internal resources, such as well-trained and supported mental health first aiders and domestic abuse support champions. Other initiatives, such as regular health and wellbeing weeks, promote healthy eating and a positive lifestyle and highlight the full range of support services available to employees.
- **Third-party support:** Togetherall's digital mental health support platform ('a safe, online community where people support each other anonymously to improve mental health and wellbeing') was launched and continues to be available to employees 24/7. The platform allows individuals with mild to moderate mental health challenges to speak anonymously with peers and to share feelings and experiences openly in a supportive and uplifting environment. Professionally trained clinicians monitor the community to ensure the safety and anonymity of all members.
- **Line manager training:** The Society views good line management as a crucial link in the employee wellbeing chain. It's committed to ensuring that all managers understand their role and are confident and capable in this area. Training was rolled out to all managers to help them identify and support team members with their welfare needs and issues.
- **Executive promotion:** The Society's leaders, including the CEO, regularly promote the Society's health and wellbeing provision via video and written addresses. Many have openly shared their own experience and that of their family members, which has had a profound impact on creating a more inclusive and open culture around mental health.



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‘We need leaders who visibly lead on wellbeing. Our CEO is a powerful advocate of this, and the dynamism and openness he shows towards mental health sets the tone for an inclusive and compassionate culture. It’s also a reminder that everyone, including leaders and managers, can experience stressors. He also challenges his own management team to truly lead by example on wellbeing.’

Rob Longmore, HR Director

- **Pandemic-specific support and communications:** A special ‘COVID-19 Support Committee’, led by the CEO, has operated throughout the pandemic. This involved very regular communications to all staff dealing with updates on the pandemic, key business messages and staff safety updates, both in the office and at home. This meant that the sudden shift to homeworking, which involved more than half the workforce in 2020, was essentially seamless, leaving all colleagues feeling that they weren’t isolated despite being away from the office. The CEO also issues weekly messages, frequently in video format, to help keep staff informed and motivated.

‘Yes, our approach to health and wellbeing is holistic and strategic – but it’s not about a label; it’s fundamentally about the actions we take and the impact of those actions on our colleagues and their lives.’

Rob Longmore, HR Director

Financial wellbeing takes centre stage

Financial wellness is typically the poor relation of most employers’ wellbeing programmes, but this is far from the case at Leek United Building Society. As Rob comments: *‘Given the current climate of the pandemic and the economic challenges posed, looking after people’s financial wellbeing is fundamentally the right thing to do.’*

Recognising the significant impact that money worries can have on mental health, in December 2021 the organisation embarked on the implementation of a comprehensive set of initiatives to enhance employees’ financial wellbeing, including:

- **a workplace savings scheme** to encourage savings behaviour by employees who can save as little or as much as they like every month from their net pay
- **commitment to a fair and equitable pay system**, such as signing up to the Living Wage Foundation and a generous cost-of-living increase to salaries, weighted towards lower-paid staff and backdated one year to provide a welcome lump sum for everyone at Christmas
- **effective pensions and retirement planning**, including an uplift in the employer contribution to the occupational pension plan from 6% to 7.5%, without requiring an increase in the contributions from staff
- **a supportive occupational sick pay scheme**, with full pay for six months for individuals with significant health conditions
- **a review of maternity, paternity and adoption pay**, resulting in two weeks’ full pay for paternity leave in addition to two weeks’ statutory, along with a considerable uplift in maternity and adoption pay (from six weeks’ pay at 90% of salary followed by 33 weeks’ statutory to 13 weeks at full pay followed by 13 weeks’ half pay and then 13 weeks’ statutory).

Demonstrating commitment with investment

The Society’s health and wellbeing provision continues to expand and deepen its impact on the workforce. As well as providing a strong employee support programme, it has signed up to the



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Good Business Charter. The Charter *'requires clear, fair and transparent policies that support and encourage employee wellbeing and ban unreasonable penalties for legitimate sickness'*.

As part of its focus on preventing ill health and encouraging early intervention where possible, the organisation has partnered with Bupa to provide regular, comprehensive health screening for everyone. Employees aged 40-plus are offered an in-depth mental and physical health screen annually, while the under-40s are offered one every two years. The screening demands a considerable financial commitment on the part of the Society, but it's one that it's determined to maintain. *'Our investment in the scheme shows how it's actions and not words that will resonate with people,'* says Rob. *'We firmly believe that fostering a well, engaged workforce means people will feel valued and understand that the business truly cares about them.'*

The Society will gather anonymised health data from the Bupa health checks to ensure it targets future wellbeing initiatives on the health needs of the workforce. According to Rob, activity in the health and wellbeing space needs to be evidence-led and the outcomes monitored to ensure that it's having impact where needed.

Investment is also being committed to improving the Society's premises. Links between the quality of workspace and employee engagement and wellbeing are well documented, and Leek United's investment in both its branch network and customer service centre aim to modernise its workspaces, giving energy to all staff. Another key objective of this work is to make the premises accessible to all, providing dignity to all staff and members that visit the Society.

Evaluating the impact

Significant benefits have flowed from the Society's serious investment in health and wellbeing, including:

- Employee engagement levels have been transformed and are now well ahead of industry benchmarks for banks and building societies, with the score for wellbeing more than 20% above peer averages. In the most recent (independent) employee survey, the score of 88% for the statement, *'The Society has prioritised my health and wellbeing during the pandemic'* was one of the highest in the industry. The highest overall score of 92% was for agreement with the statement, *'The Society has provided strong leadership throughout the COVID-19 pandemic.'* 'Internal communication' scored at 90%, an improvement of more than 60% against 2019, showing the value of the considered approach that has been taken.
- Absence rates have reduced significantly over the past year, and while this may be partly due to increased homeworking, a similar reduction has also been noted within the branch network. In branches, staff have continued to admirably work on the front line throughout the pandemic, providing consistent service to members.
- Staff loyalty and retention rates have increased dramatically, and the Society has experienced very low voluntary turnover levels compared with many others in the sector.
- In terms of the wider business benefits, 'staff efficiency' has improved significantly in terms of business volumes versus cost of delivery – for 2020, costs as a proportion of total loans and advances reduced by 1.3% against 2019 and by 5.2% against 2018.
- The organisation's culture was independently audited in 2021 by one of the 'Big Four' audit firms and received the highest possible grading, with a hugely positive overall assessment. This is an achievement that the Society is fiercely proud of.

The Society works hard to prioritise employee wellbeing and embed tangible actions across its operations, culture and people management practice. *'We're proud to demonstrate the difference that our investment is making on these important metrics, at a time of such turmoil in the external environment,'* says Rob. *'It shows how employee health and engagement go hand in hand with business performance.'*



2 Scottish Council for Voluntary Organisations (SCVO)

The Scottish Council for Voluntary Organisations (SCVO) is the national membership organisation for Scotland's voluntary sector. It has 95 employees and over 2,000 member organisations from charities, social enterprises and voluntary groups across the country.

Embedding a coaching culture to empower staff

For Anna Fowlie, CEO of SCVO, promoting health and wellbeing in the workplace starts with building an organisational culture that empowers staff to fulfil their potential and supports them through understanding and responding to individual needs. When Anna joined the organisation in 2018, she was shocked at the behaviour and attitudes of some staff: *'The culture was quite toxic. Just to get people to be respectful to each other required a significant change from the top-down.'*

Anna initiated a huge culture change programme based on an intensive one-on-one coaching programme for managers:

'We wanted to build a coaching culture focused on empowering staff – moving away from a directive, top-down management approach to one where you trust people to do the right thing. It's about people who are in management positions understanding our staff and working with our staff and taking as many decisions themselves as they can, but knowing the framework and knowing that they will be supported if they make a mistake. We have a strong focus on people being accountable for themselves, their own work and to their colleagues.'

Key policies were also reviewed and updated to ensure they supported the desired culture. This included changing the language of communications from the passive to the active voice. Anna explains: *'We moved from "it was decided" to specifying who decided so that people feel accountable and everything is more straightforward.'* The SCVO has been supported by an external adviser, Maria Moreno, in this work.

Establishing trust and encouraging employee voice

The success of the culture change programme has supported the SCVO's employee-centric approach to wellbeing through improving relationships and trust and encouraging employee voice. Communications were further ramped up during the COVID-19 pandemic when employees were forced to transition to working from home:

'We had been conducting regular staff surveys prior to the pandemic, but we stepped this up with monthly temperature checks. We wanted to know how people were feeling, what was impacting them – anything – including work issues, family issues, financial worries.... We've got trust now, which we didn't have before the culture change programme and things came to the surface that people had been struggling with, even prior to the pandemic, but kept really quiet about.'

Anna Fowlie, CEO



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Role-modelling

Some employees struggled to work from home during the COVID-19 lockdowns. Their living situations, the available workspace in their home, confidentiality issues or the nature of their partner's work made it really difficult for them to have a space to work. As Anna admits: *'There was little we could do other than be really understanding and really flexible.'*

The senior leadership team demonstrated their understanding of the challenges people were facing through strong messaging and role-modelling. As Anna explains:

'One of our male senior directors has very young children and his wife is a teacher. She was having to teach remotely and he had to do the childcare. I encouraged him to put it in his diary that he was not available due to childcare so that people could see that even a man in a very senior position can take time to look after his children. It sent a very strong message that showed it was acceptable for everyone.'

Employee-centric, flexible approach to wellbeing

Regular and open communications have enabled the organisation to understand individuals' circumstances and needs and tailor their wellbeing approach to best support them. For example:

- **Responding to the physical nature of working from home:** Employees are regularly asked if they have the facilities and equipment they need, and a portable kit is provided that can be used at home or in the office. Staff can request a chair and desk to use at home if they don't already have a suitable set-up. During lockdown, the facilities team delivered individuals' office chairs to their homes. The organisation made clear that the health and wellbeing of employees was a priority and they would pay for any appropriate equipment people needed:

'Some people have taken up standing desks to avoid or help back problems and we offered advice on what would work best. Some people didn't have a table in their home to work on when lockdown started. We have really emphasised to all staff that if they haven't got something, don't feel you can't ask or we can't afford it because we just had to afford it.'

Anna Fowle, CEO

- **Mental health and mental wellbeing:** The SCVO had a strong focus on promoting mental health prior to the pandemic, including through training for managers, staff and mental health first aiders. The monthly temperature checks helped to identify additional health risks, particularly related to remote working, such as loneliness or, conversely, the challenges of being unable to escape shared living arrangements. This has enabled the organisation to provide appropriate support. The SCVO also established a Teams channel for people to post articles or classes related to mental health and wellbeing issues and strategies, which many employees found helpful and engaged with.
- **Managing workloads and working hours:** Many in the organisation faced very heavy workloads at the beginning of the pandemic, as they worked in partnership with the Scottish Government on the pandemic response and faced a surge in demand for member services (such as managing furlough processes, and digital support):



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‘There are times when you have to do that but it really takes its toll, so we had to be quite clear with people around working hours. And of course people had to balance work with family responsibilities, especially when schools were shut. So, whereas normally we would discourage people from sending emails at 9pm at night, we recognised it might suit some people best to send emails then. But we were also aware that others who received emails at 9pm might think they had to respond then. So we had to be really, really clear that that isn’t the case. We had to take everyone’s circumstances into account.’

Anna Fowlie, CEO

As a consequence, the organisation established a blended working policy, developed in collaboration with staff. Employees can agree with their line managers when and where they work, within agreed parameters, giving staff and managers the flexibility to balance business needs with individuals’ needs. To support blended working, the SCVO has removed the need to work for the organisation for a certain period of months before you can make a flexible working request and removed the one flexible working request per year limit.

- **Genuine focus on flexible working:** The SCVO’s efforts to support individuals’ needs and circumstances extend to their location of work. Anna comments: *‘We have people who work abroad when it suits them, for example, one of our colleagues, even before COVID, worked part of the time in Greece, part of the time in Scotland, for family reasons. Another colleague has family in Ghana, so he works from Ghana for a few months of the year.’*
- **Financial wellbeing:** During the pandemic, it became clear that a few employees had been struggling for some time with financial concerns. The SCVO has connected them with practical sources of support through its strong links with organisations in the voluntary sector and has also improved communications to all employees regarding support in this area. The organisation ensured that the few employees who were furloughed did not suffer financially through topping up their salaries in full. It has also shown staff how to claim work-from-home tax relief through HMRC to offset some of the costs of remote working.

Mutual gains

The SCVO’s investment in building an empowering and supportive culture through coaching has had clear productivity benefits for the organisation. As Anna comments: *‘Engaging the services of an external coach was not cheap for us, but our evaluation of the monetary outcomes found it had resulted in more business coming in, shorter meetings and other benefits for the organisation, so that it almost paid for itself.’*

In addition, the employee experience has been transformed. The organisation’s success in embedding wellbeing, flexibility and accountability within the culture is demonstrated by teams and individuals [initiating dialogue](#) on how they can better support each other and avoid slipping into unhealthy practices. This has included agreeing, trialling and documenting team ‘rules’ and etiquette, such as limiting the number and length of meetings, establishing protected time away from screens and making use of an open voice channel to enable remote workers to chat while working on routine admin tasks and emails:



'Our absence rates have gone right down and turnover has been low. Our staff surveys and feedback confirm how far we've come. People say this is a great place to work and that it feels like the organisation really cares about them. We were proud to achieve a high score in a recent self-assessment against the Fair Work Principles and we're going to continue to gather feedback and improve through working with Investors in People.'

Anna Fowle, CEO

To download the full *Health and wellbeing at work* survey, including a range of resources produced in partnership with Simplyhealth, visit the [CIPD website](#).



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