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## Finance Directorate People Engagement Strategy

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### 1. Introduction

The success of our Directorate is built on our people. We want to develop an environment where they can perform at their best and be involved in our successes.

The Strategy has been created to establish a shared understanding of what employee engagement means to us within the Finance Directorate, and how we can improve it. Its aim is to shape the way employee engagement is thought about, and influence the way people approach their roles within the Directorate; embedding engagement so that it becomes part of 'what we do'. The thinking behind our strategy and its action plan has been formulated by listening to the views of our people.

#### 1.1. What is Employee Engagement?

"It is generally seen as an internal state of being – physical, mental and emotional – that brings together concepts of work effort, organisational commitment, job satisfaction and 'flow' (or optimal experience)."<sup>1</sup>

Simply put, employee engagement is about us feeling that we are part of something we believe in; we are valued, and what we do has value too. When we are engaged we are motivated to contribute to organisational success; we perform better, are more productive and customer focused. Engagement brings mutual benefit to both the individuals and our Directorate.

There are many definitions of employee engagement<sup>2</sup>. In order to have shared understanding we created our own definition of employee engagement for the Finance Directorate:

*"Happy to work together to meet worthwhile goals in an environment of mutual commitment, support, trust and respect"*

Whilst there is "no one size" fits all approach to engagement, studies have shown the five enablers of engagement (Engage for Success research<sup>3</sup> and Bridger (2015)<sup>4</sup>) are essential in achieving successful employee engagement. Our strategy and our approach are based around these five engagement enablers:

1. *Employee Voice:*  
Open channels of communication throughout the Directorate; views are sought out, they are listened to and can see that their views and opinions make difference.
2. *Integrity:*  
Values are lived and not just spoken, leading to a sense of trust and integrity

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<sup>1</sup> <http://www.cipd.co.uk/hr-resources/factsheets/employee-engagement.aspx> 2015

<sup>2</sup> Macleod, D and Clarke, N (2009) *Engaging for success: Enhancing performance through employee engagement*, Department for Business, Innovation and Skills, London [Online] <http://engageforsuccess.org>

<sup>3</sup> [www.engageforsuccess.org](http://www.engageforsuccess.org) (2015)

<sup>4</sup> Bridger (2015) *Employee Engagement*, Kogan Page Publishing London

3. *Involvement:*  
Creating opportunities for employees to be involved and contribute to the success of the Directorate.
4. *Strategic Narrative:*  
Understanding of the vision of the Directorate; where the Directorate is going and what it is we are collectively aiming for.
5. *Engaging Managers:*  
Engaging managers focus their people, treat their staff as individuals, coach and stretch them. Engaging managers give their staff the opportunity to engage with their team and the Directorate fully.

## 1.2. What are the benefits of employee engagement?

Studies show that improving employee engagement has a positive and significant effect on performance. There is ample evidence of the relationship between employee engagement and:

- Productivity
- Performance
- Customer satisfaction
- Innovation
- Financial efficiencies
- Absence
- Retention
- Health and safety
- Wellbeing<sup>5</sup>

In addition to these benefits engagement also benefits the individuals themselves. These include:

- Greater motivation and moral
- Relationships with other employees in the Directorate
- Sense of purpose
- Feeling happier, healthier and more fulfilled

## 1.3. Why are we doing it?

Following the Best Finance Team project conducted at the start of 2015 it became clear if we wanted to become the "Best Finance Team" in the sector we needed to improve our engagement levels in order to:

- Achieve our Finance Vision
- Utilise the benefits of engagement for individuals, teams, and the Directorate
- Becoming one team with one voice

This has been supported further by the *Best Finance Team Baseline study conducted in July 2015*; our *Employee Engagement Health Check* survey and the *2014 Employee Opinion Survey (EOS)* results. The results from the *Employee Engagement Health Check* showed that our Directorate has average levels of engagement. These were attained across all of the five enablers, with pockets of best practice in some areas. The results suggest that enablers such as Employee Voice, Integrity and Involvement require the most attention.

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<sup>5</sup> D'Analeze, G, Dodge, T, Rayton B (2012) The Evidence: Employee engagement taskforce, 'Nailing the Evidence' workgroup, engage for success [Online] [www.engageforsuccess.org](http://www.engageforsuccess.org)

The EOS results were also positive. The results showed that 46.4% of our Finance Directorate were engaged and 41.2% were enrolled (reasonably engaged). This Strategy aims to move those enrolled participants into the engaged category.

We want to share our pockets of success, and improve elsewhere so that the Finance Directorate can become an even better place to work and a best practice area for engagement within the university and the sector.

#### 1.4. Our Finance Directorate barriers to engagement

In our first *Engagement Working Group* session we looked at the barriers to engagement within our Directorate. These were then taken to the *Engaging Managers Workshop* to look at how managers can help their teams overcome these. Below are the solutions that were put forward by our management community:

Barriers to engagement	Solutions
Lack of visibility	<p>Leaders should take the time to talk to others</p> <p>Two way process - individuals as well as managers have ownership of this</p> <p>Open door policy communicated to all our people</p> <p>Finance Leadership Group should visit teams</p>
Team rules	<p>Communicate why there are inconsistencies:</p> <p>Why there is a need for differences</p> <p>Accept or change</p> <p>Team members Challenge rules if applicable</p>
Apathy	<p>Identify apathy within teams</p> <p>Partner up within teams; have a buddy system</p> <p>Show staff the bigger picture and how they fit into this</p>
My manager won't let me	<p>Consistency</p> <p>Explanation to staff why, if they can't do something</p> <p>Staff can challenge manager</p> <p>Communicate where staff can go if they don't want to talk to their manager</p>
Central vs Faculty Finance/ We don't know what people don't know what/ Silo mentality	<p>Build relationships</p> <p>Hold all team events</p> <p>Understand and appreciate each other's deadlines</p> <p>Invite others to team meetings</p>

	Visual representation of busy periods Find out what people do
People going up not across for help	Better communications between teams All team events
Lack of face to face appreciation	Managers should take the time to do it Softer skills should be endorsed
Perceived lack of time	Tell staff "I will allow my staff the time to attend and I will verbalise that so they know." Understanding the pressures on your team Cultural change
Feedback and ideas not fed back or up consistently (and are not always listened to)	Use team meetings effectively. Create the opportunities and channels for your teams

Solutions were put forward by our managers to all of the barriers to engagement identified by the *Engagement Working Group*. All of these actions have been added to the engagement action plan.

### 1.5. Finance Directorate Mission, Vision and Values

Employee engagement is about our people feeling that they are part of something bigger than themselves. It is about our individuals collectively working to achieve our goals, objectives and ultimately organisational success. It was therefore imperative created our Mission Vision and Values prior to moving forwards with our engagement work.

Our Directorate mission, vision and values will help us to become part of a stronger team by having a collective goal.

As a Directorate our Vision is to:

*"Be the best finance Directorate in the sector; A highly motivated, engaged team, valued by all"*

We will achieve this by carrying out our mission:

*"To ensure financial sustainability for Sheffield Hallam University through high quality business relationships, informed decision making, expert advice and guidance"*

Recommendations were made following the 2015 Baseline report that the Directorate needed to create more meaning in people's work - articulating the links between individual job and broader Directorate and institutional aims. The Directorate's 2014 EOS results also highlighted that not all our Directorate could clearly see how they fit into the bigger picture of the Directorate or the university. To address these issues as well as our Finance Vision each team or area took part in a vision workshop to create their own vision. These workshops highlighted their team's collective purpose and helped them to see we need all of the teams working on their bit in order collectively achieve our Finance Vision.

All of the work we do within our Directorate will be underpinned by our Finance Directorate values which are to THRIVE:

Trust  
Honestly  
Respect  
Innovative  
Valued  
Engaged

As part of our action plan work will continue to help embed our Directorates Vision, Mission and Values.

## **2. Aims and Objectives of the Strategy**

Our Strategy aims to increase levels of engagement across the Directorate; specifically around, *Employee Voice; Integrity; Involvement*<sup>6</sup>. We will also look to improve *Engaging Managers* and *Strategic Narrative*, sharing best practice where possible. Our aim is to embed engagement so that it becomes part of 'what we do'.

Below are our specific aims for each of the enablers:

### **Employee Voice:**

We want all of our people to have access to the same channels of communication; we want them to be empowered to give their ideas, challenge and feel that they are listened to. We want our people to receive consistent feedback to explain why decisions have been made.

### **Integrity:**

We want our people to feel trusted by leadership and management. We want them to be recognised for the contribution they make to achieve our vision.

### **Involvement:**

We want all individuals and teams to be given the same opportunities to engage and be involved in organisational success.

### **Strategic Narrative:**

We want all of our team to know what our Directorate vision, mission and values are and how they fit into the overall picture of the Directorate. We want our values to be embedded and everyone in the Directorate to live by these values every day.

### **Engaging Managers:**

We want our managers to encourage their people to engage fully with their team and the Directorate. We want our managers to lead by example and embed the vision mission and values within their team. We want our managers to take ownership of their own and their team engagement and create a culture of engagement within the Directorate.

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<sup>6</sup> as these were the areas that required most improvement within our Directorate

## Other aims:

We aim to create a feeling of one finance team within the Directorate. Some of our engagement activities may not fit into any of the enablers but may be taken forward if we felt it would create a more unified Directorate.

We also aim to move the 41.2% of our people who identified themselves in the 2014 Employee Opinion Survey as being enrolled into the engaged category.

We will use a number of measures, throughout the year, specified in our action plan, to monitor our successes.

## 3. The approach

There is no "one size fits all" model of engagement or a solution that can be adopted by all organisations to address employee engagement. Any initiatives taken to address engagement must be tailored and implemented individually to the Directorate. We can only do this by listening to our people.

Our approach involves two primary principles:

- Individual involvement
- Leadership commitment

**Individual involvement** will come in the form of the Engagement Working Group, Finance Managers Group and Directorate wide involvement. The LICC will also be involved in the approval of the overall plan.

The *Engagement Working Group* has been set up to help create, promote and steer the engagement strategy and its action plan. The members of the group are from all teams across our Directorate. These people are our "*Engagement Champions*", they champion and promote awareness of employee engagement across the Directorate by coming up with great ideas, and feeding back the views from their teams into our work.

Our "*Engagement Champions*" also play a huge part in helping us to embed the vision, mission and engagement initiatives within their teams and across the Directorate. This group are critical to the success of our engagement strategy as they represent the views of their teams, and therefore our people. It is only by listening to our people that we will achieve a greater level of engagement within the Directorate.

We will set up a "*Managers Working Group*". This will be aimed at managers who are not part of the Finance Leadership Group. Its purpose is to help create a culture of engagement amongst managers and teams alike. This group will capture the thoughts of the management community; take forward some of the actions from the engagement action plan and consider how these can be embedded into the Directorate.

Engagement cannot be done to individuals it has to be experienced by them. Therefore individuals within the Directorate also have a responsibility to take ownership of their engagement.

**Leadership Commitment** is critical to our success. Our engaged leaders will get involved, and will demonstrate their personal belief and commitment to our vision. They will communicate our vision to their teams and will motivate them to help us achieve our vision. They will also allow their teams the time and the opportunity to be part of the Directorate, and engage fully with their team and the wider finance team. Clear signals and demonstrable actions need be led by senior leadership team, to help cultivate a culture of engagement within the Directorate.

The implementation of the strategy and its action plan will be supported by:

Tool kits  
Workshops  
Communication tools like Infographics

Our action plan has been created separate to the strategy. This will be a living document and include quick wins, medium and long term activities. The activities have been developed with the *Engagement Working Group* and our "*Engagement Champions*" thus ensuring that the needs of the Directorate have been met.

#### **4. How will we measure engagement success?**

We will be assessing and measuring the engagement enablers using a number of measures across the board to help us do that. It will look to include things like:

- Attendance levels improve by %
- Attendance at engagement events
- Annual Health check score
- Pulse checks on the key enablers
- The number of ideas/suggestions - Monitor how many are submitted.
- Number of respondents to surveys
- Talking to individuals

It will be specified how we will measure each action on the action plan.

It is important to note that engagement levels are sometimes difficult to quantify<sup>7</sup> and can't simply be measured by numbers and figures. We need to also be aware of the "Feeling" of the office and the "happiness" of our people. This will also be used to see if our engagement actions are making a difference to our people and our Directorate.

#### **5. What will the Action Plan include?**

The action plan will be a living document that will plan out our engagement activities for the next 12 months. It will be reviewed at the end of this period. The action plan will include the action; its enabler; how it will be measured; what type of action, and its estimated time of delivery e.g. a quick win, long or medium term action; if it has been approved; what its deadline is; who the operational owner of the action is; if it will be taken forward; and if not why not.

##### **Theme**

All of the actions will be put into the enabler themes. Some actions will fit into, and make improvements in more than one enabler of engagement. If this is the case we will categorise the action into its primary enabler of engagement e.g. If we introduced a Managers Development Programme it could fit into all 5 of the enablers but we would categorise it into Engaging Managers as this is the primary enabler it will impact.

##### **Objective**

This will describe the objective for each of the enablers.

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<sup>7</sup> D'Analeze, G, Dodge, T, Rayton B (2012) The Evidence: Employee engagement taskforce, 'Nailing the Evidence' workgroup, engage for success [Online] [www.engageforsuccess.org](http://www.engageforsuccess.org)

## **Action**

This section will outline the action in detail.

## **Measure**

As discussed above we will be measuring the engagement enablers using a number of measures across the board to help us do that. This part of the table will say how we are specifically looking to measure the success of the action in question

## **Type**

This will look at the type of action and the estimated time of delivery e.g.

- Quick Win (QW);
  - Quickly actioned with little effort or resource
  - Deliverable in 0 - 3 months
- Medium Term (MT) action
  - Requires some resource and thought
  - Deliverable in 3 - 9 months
- Long Term (LT) action;
  - Requires a lot of resource or thought
  - Deliverable 9 - 18 months

## **When**

This will be state when the action should be implemented.

## **Owner**

The operational owner is the person who is responsible for the implementation of the action.

## **Approval**

All actions need to obtain approval from the Finance Executive before implementation. This section will state if approval has been acquired or not.

## **If not why not**

If the above section is not ticked, this will explain why the action is not being taken forward.

## **Progress**

This will have a description of the progress of the action. What is being done, by who, if it is being held up by anyone etc.

## **Achieved**

This section will state if the action is open ; closed or partially competed.



Below is a visual representation of what it will include:

**e.g. Theme: Integrity**

Objective	Action	Measure	Type	When	Owner	Approval	If not why not	Progress	Achieved
We want all individuals to be given the same opportunities to engage and be involved in organisational success.	A low-key 'thank you' programme	Programme in operation	QW	Feb - 16	Anna Gunn	Yes	N/A	Plan being drafted	Open

The action plan will be supported by:

- Tool kits
- Workshops
- Coaching
- Conversations
- Feedback tools
- Infographics

## 5.1. Governance

### Approval Process

All actions on the plan require approval by the Finance Executive before the actions can be taken forward. We will endeavour to get these actions approved in a timely manner.

### Ownership

Each of the actions will be assigned to a named person whose responsibility it will be to drive that action forward.

## 5.2. Communications

The communications framework; along with the Engagement Working Group, Finance Leadership Group, LICC updates, Engagement Champion activities, and infographics of key information; will be supported by blog posts on:

[https://blogs.shu.ac.uk/financevisionjourney/?doing\\_wp\\_cron=1446569765.8729670047760009765625](https://blogs.shu.ac.uk/financevisionjourney/?doing_wp_cron=1446569765.8729670047760009765625)

## 6. Conclusion

In order to make a cultural change the Finance Directorate needed to put employee engagement firmly on the agenda. This engagement strategy and its action plan will take us on that journey.

The strategy and its action plan will be brought to life by the Finance Directorate Leadership Group, Managers, Teams, Engagement Working Group, Engagement Project team, and all of our Finance Directorate. Every member of the Directorate has a responsibility in making this a success.

By listening to our people and implementing their suggestions in line with the five enablers of engagement we will have an engaged workforce who will work harder for the Directorate; be more productive; find more innovative solutions to problems; be happier; more fulfilled; work better as a team; and the Directorate will be an even nicer place to work.

## **7. Appendix Available on separate document**

**7.1. Engagement Health Check Results September 2015**

**7.2. Best Finance Team Baseline report 2015**

**7.3. Best Finance Team Gap Analysis 2015**

**7.4. Attendance at LICC coffee mornings 2014-2015**

**7.5. Away Day Attendance 2013, 2015**

**7.6. Attendance Records**

**7.7. EOS Summary**

**7.8. Engagement Pyramid**

**7.9. Engagement Working Group Terms of Reference**

**7.10. Managers Engagement Working Group**