

Rolling out wellbeing conversations across the NHS – case studies

Lancashire and South Cumbria NHS Foundation Trust

What was the aim?

Lancashire and South Cumbria NHS Foundation Trust reviewed their NHS Staff Survey results, where it was indicated that there were some inconsistencies to how line managers approached appraisals, and whether supportive and meaningful wellbeing conversations were taking place.

As a result, the Trust co-designed and developed a conversation workbook which would sit alongside and complement their current system, with the aim of ensuring meaningful wellbeing conversations took place during staff appraisals.

A soft launch of the workbook began in April 2019, reminding colleagues and line managers that meaningful health and wellbeing conversations should be taking place and were aligned to the organisation's compassionate values.

What was the solution?

Using staff feedback to shape the design, a conversation workbook was drafted and developed to sit alongside the current appraisals system, with the aim of ensuring meaningful wellbeing conversations took place during staff appraisals.

What were the results?

After launching the workbook, staff were invited to share examples of what they think worked well, and where there were areas for development. Some suggestions included:

“The workbook itself provided a good structure and framework to help guide the conversation with useful prompts and questions and easy to read. It also allowed for preparation time and how to organise these thoughts and ideas. Afterwards, it also helped guide reflection on the subject raised.”

“In regards to the actual conversations, it was agreed that the structure also helped prompt two way conversations to flow and staff stated that the conversation felt person centred, they felt valued and supported.”



“On reflection, meaningful goals and objectives were clearly visible thus helping staff understand their place within our organisation. This also provided a clear structure for further check-ins and conversations.”

Suggested areas for development included shortening the workbook and offering an electronic version. One final key reflection was a request to ensure colleagues are offered dedicated, protected time to have wellbeing conversations and appraisals.

Staff were also invited to share any final free-text reflections:

“The workbook helped in focussing conversations on my health and wellbeing and ensure that I have a wellbeing goal. It helped me to reflect on the contribution I am making to the care of our patients. It focussed my thoughts on the Trust values and the behaviours that I demonstrate and where there may be room for improvement”.

“This was a completely different experience to the PDR. I felt me as a person was the central point and that I was valued as a staff member for my contributions without added expectations”.

What were the learning points?

The Trust outlined five top tips for any organisations wishing to follow a similar process and introduce a wellbeing conversation workbook.

1. Senior leadership support – it is essential that leaders are supportive, cited on the work and are briefed on how the work aligns to strategic objectives and Trust values.
2. Engage and co-design – consider the use of creative staff engagement workshops to develop and design together.
3. Establish a staff led group – identify key people and passionate advocates to support the work.
4. Communication is key – secure support from the Communication Team, be prepared to cascade, brief and promote at all levels.
5. Review the work – build in reflection, audit and review to ensure the desired outcomes are being achieved.

What are the next steps?

The Trust have now set up an “Appraisal Task and Finish Group” to support the delivery of an internal staff survey to seek feedback from colleagues on their appraisal experiences. All

staff will be encouraged to complete the survey once a year (following their annual review and compliance recording). Data from this internal survey will be downloaded locally and used to facilitate reporting and progress updates.

The Trust is committed to improving employee experience and the quality of appraisals, understanding the links there are to performance, wellbeing, and continuing development. All of this is vital as our organisation seeks to develop a more compassionate and inclusive culture and continuously improve our services.

Want to know more?

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