

BESPOKE PROPOSAL

Wellbeing



The Glass Ceiling Project – Bespoke programme is pleased to offer the following proposal to support your organisation's decision to optimise the support the wellbeing of your staff, particularly in relation to the handling of complaints and harassment reporting.

As the budget for this project has currently not been finalised, various possible levels of support have been outlined below for your consideration. They are intended to offer an understanding of the different packages available, all of which utilise 'days' that can be used for different combinations of reviews, reports, training, talks and workshops etc. The first two options can be used in a modular way and scaled up as necessary.

1) Off-the-Shelf

This is the off-the-shelf entry level offering which buys **ten (10) days** of consultancy time. This is available at short notice for a reasonable cost and utilises popular talks and workshops. Each of the below includes set-up and delivery.

Off-the-shelf talk: 0.5 day
Off-the-shelf workshop: 2 days

After each talk or workshop an anonymised **feedback survey** will be taken and provided to the client.

2) Tailored

This level of support offers the option of content, based on the Glass Ceiling Project Library but tailored to the client's needs. It generally takes a few weeks to prepare depending on the availability of the necessary consultant(s). There are **thirty (30) days** available.

Tailored talks: 2.5 days
Tailored workshops: 5 days

After each talk or workshop an anonymised **feedback survey** will be taken and provided to the client. Also, a **list of suggestions** for improvements can be provided.

3) Premium

The Premium level has been designed for an organisation committed to a comprehensive programme of change. Lead times depend on the availability of the necessary consultant(s). There are **one hundred and twenty (120) days** available which are delivered in several phases.

Phase 1: Assessment

This phase will assess the current cultural environment of your organisation via a review of current policies, procedures and organisational charts, followed by one-to-one interviews/ small group sessions with an approved cross-section of staff and management.

At this time, we will establish the baseline figures for the measurable areas that the programme is looking to address.

We will also consider how issues or concerns are currently being addressed and offer alternative options. Our aim here is to establish best industry practice in conjunction with your specific capabilities, resources and aims.

EXAMPLE

Baseline Figures against Measurable Outcomes

Overall Aim

Successful identification of Client as desirable employer by current and prospective workforce

Soft Outcome

- Improvement of attitudes / relationships / skills / confidence & assertiveness
- Improved Employee satisfaction with management, HR and other relevant departments
- Improved perception of managerial competence, skill, process, vision

Hard Outcome

- Increased retention rates/less turnover
- Increased attraction of talent

Evidence

- Interviews
- Engagement surveys
- Focus Groups
- Anecdotal Feedback

Phase 2: Feedback to Oversight

The findings of the assessment phase, along with relevant observations and suggestions would be reported back to the oversight individual or group.

This report will focus on the following areas:

- 1. Communication practices**
 - To identify and offer options to address any less than ideal communication practices. These might include suggestions for one-to-one or group training, talks or seminars.
- 2. Reporting options for sensitive topics**
 - To consider whether sensitive or potentially inflammatory topics are dealt with appropriately and offer reporting options to the relevant parties.
- 3. Clear reporting pathways**
 - To review the level of clarity around existing organisational structures and whether staff are confident that they will robustly address issues they encounter.
- 4. Management responsibility assignment**
 - To guarantee that accountability is correctly assigned and supported.
- 5. Proportionate disciplinary levels**
 - To create levels of response to identified issues which are proportionate to their severity and increase certainty of amicable resolution.
- 6. Support network building**
 - To review the efficacy of networks within the organisation that provide suitable wellbeing support to staff and management.
- 7. Various training options for relevant individuals, departments or groups**
 - These options might include Human Resources, Supervisors, Mentors

EXAMPLE

Options for Sensitive Topics

Training can be delivered, and **templates** provided to ensure that responsible parties are prepared to deal with sensitive topics in line with organisationally approved aims. Correct messaging - around any situation of concern - creates certainty that allegations are addressed in a professional manner.

Messaging guidelines would ensure that appropriate assurances and statements are made i.e. that all efforts will be made to establish the details of the matter and reach a satisfactory resolution for all parties.

For example, in relation to harassment allegations, initial messaging **guidelines** might direct responsible parties to avoid the terms 'Accuser', 'Accuser', 'Attacker' and 'Victim' as these might be construed as inflammatory and/or accusatory. Further messaging might consider the following:

- **Individual seeking support or 'Reporter'**

Training and template guidelines aim to ensure that the Reporter feels heard, valued and included. The concept of 'belonging' is key here, as individuals in this situation can often feel isolated and powerless. There are also several options that can be offered during this first meeting to help this staff member feel safe and more confident of the organisation's ability to deal with the matter in responsible way.

Guidance in relation to **procedures** can also be provided. For example, any statements made by the Reporter should be witnessed by two individuals, the responsible party and a party that is trusted by the Reporter. Key observations should be recorded and signed off by all present as well as the Reporter's ideal outcome, i.e. informal, formal or criminal proceedings.

- **Individual requiring Direction or 'Identified Party'**

If a statement has been made that involves the behaviour of another party, then the Identified Party should be made aware of the allegations made, the measures that are being taken to establish the veracity of the report made and which actions are open to the individual at this time.

The severity of the allegation and the understanding of the facts at hand should be sensitively reflected in the delivery of the messaging. At the most basic level, the individual would be asked, on record, to treat the matter as confidential and not to approach the other party until the matter has been resolved.

The response must be proportionate to the severity of the allegation. For example, if a transgression does occur but no formal (i.e. warnings, salary or bonus impacts) or criminal action is deemed necessary, then messaging around this informal course of action is extremely important. For example, in situations involving intimidation, rather than conveying a message to these individuals that others fear them and that they are powerful, individuals might be directed that their behaviour is not conducive to the wider needs of the community and the ability of its members to exist and contribute in a healthy environment.

Phase 3: Road Map

A road map of how the Client would like to proceed would be drawn up in view of the requirements and the mutual availability of resources and staff by the Client and The Glass Ceiling Project consultants and speakers. This roadmap would include timelines and key changes to be made in the policies, procedures and practices as well as options for talks, training, support and workshops for identified groups.

EXAMPLE

Road Map

Timelines provided are approximate

PHASE 1: Extra Interviews: Recent hires (up to 1 year)	3 days
Extra Interviews: Staff dealing with complaints and harassment reports	3 days
PHASE 2: Interim Progress Report: Focusing on areas for improvement	1 day
PHASE 3: Road Map Agreement: Suggested changes to Policies and Procedures	1 day
Agreement: Schedule timing for talks, training and workshops	2 days
PHASE 4: Roll-out	As required
Templates: Agreed messaging guidelines	3 days
Treatment options: For affected staff (i.e. home support, re-integration)	3 days
Support network: Establish scope and structure	3 days
PHASE 5: Revisit, review and refine: Approximately six months after completion	5 days

Phase 4: Roll-Out

The agreed programme would be rolled-out to the various individuals, groups, departments and networks identified in the earlier phases.

EXAMPLE

Workshop Discussion

Banter Rich Environments - Pros and Cons of One Organisation's Approach

Young female gardener is weeding a garden. A group of older male gardeners stroll up. One makes the comment 'Ha! Every time that we see you, you are on your knees'.

That organisation's approach...

1. **Forewarning:** 'We tend to have a lot of banter here...'
2. **Indication of Intention:** 'It is meant to be playful; we don't want to hurt anyone's feelings.'
3. **Avenue of Complaint:** 'If you have any problem with it, please tell us and we'll work on it'

Is this acceptable? If it isn't, what are the repercussions / ideal outcomes? If it is, under what circumstances?

Phase 5: Revisit, Review and Refine

An agreed amount of time after the completion of the roll-out, a consultant from The Glass Ceiling Project would revisit the Client, review the progress of the programme and address any aspects of the programme that might need refining.

EXAMPLE

Revisit, Review and Refine

Overall Aim

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Talk/Workshop Options

An updated and comprehensive list is available on request; however, all levels of support include the following:

a) Power and Language

The aim here is to increase awareness and use of the power dynamics in language by individuals. We also consider what can be observed in the language of others. More powerful and compassionate approaches to language are explored with attendees using anecdotes, studies and various interactive techniques.

b) Self-Awareness

Everyone should understand how their individual personality works (or doesn't) with their environment. This workshop steps through the different stages of awareness and considers how interactions can be maximised.

a) Resilience

Many of us regularly feel overwhelmed by the many demands on our time, attention and energy. The aim of this workshop is to offer the attendees a range of methods used by individuals familiar with high stress situations (primarily elite sports people and military personnel) to promote resilience.

b) Dealing with Difficult Situations

Learning to deal with difficult or awkward situations is an extremely useful skill in the workplace. In this workshop we offer an overview of how successful communications can be achieved, and how to minimise the outcomes or entirely avoid less successful communications.

Talks on *Judgement and Decision-Making*, *Bias in the Workplace* and *The Art of the Appraisal* are also available. These can be extended into workshops on request.

Further services might include:

- One-to-one coaching for staff or management
- Top class speakers
- Extra group or departmental training as requested
- Podcasts with industry insiders

Background of the Founder – Lene Hansen

- | | |
|---|---|
| - Bachelor of Science (Psychology) | University of Queensland |
| - Bachelor of Laws | University of London |
| - Master of Philosophy (Criminology) | University of Cambridge |
| - Rowing Blue | University of Cambridge |
| - Investigator | Hong Kong Securities and Futures Commission |
| - Corporate Litigator | Financial Secretary of Hong Kong |
| - Regional COO for Compliance | ABN AMRO Asia |
| - Regional Head of Programme Management | Royal Bank of Scotland |
| - Management/Compliance Consultant | Bips Global Ltd |
| - Keynote Speaker, Mentor, Coach | |

Testimonials for Lene

Lene [has] deep industry knowledge honed from her considerable experience working for exchanges, regulators and sell-side firms, which proved invaluable in driving our think-tank style discussions.

Mike Burton – CEO – Q15

Everyone needs a Lene on their team – she simply makes the world a better place and has so much to offer.... she is professional, motivating, inspirational and highly competent. I couldn't recommend her highly enough.

Marie Wright – Executive Coach – Bold Bean Coaching

Lene is a highly thoughtful and articulate individual, who is always a pleasure to deal with. When you have a conversation with Lene, you come away feeling energised by her positivity, her enthusiasm and her natural curiosity.

Mike O'Hara – Partner – The Realization Group

Lene helped to clarify areas I needed to focus on and open my mind to new possibilities. She made a true and significant difference to my approach to the next steps of my career. She is intuitive, assertive and a true inspirational leader.

Gemma Arregui - Head of Operations - G-Kaizen

Always a pleasure to work with Lene. Concise, clear and fantastic at motivating and exchanging ideas in such a dynamic industry like the financial markets.

Alex Parsons – VP – Head of Investment Control – Amundi

Lene is one of the few people I've met with that rarest of skills, to make you feel like you've been listened to even when you haven't said a word.

Rob Miller – BBC