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# Engagement Report 2019



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## Executive summary

The energy and commitment of our staff are the driving force behind the EPO. Our engaged employees are passionate about their work, dedicated to quality and keen to advance the organisation's strategic goals. Their emotional connection to the EPO's values not only channels their energy into a shared purpose, it also helps to secure the organisation's long-term sustainability.

This report provides an overview of our staff engagement activities in 2019, which started with an office-wide staff engagement survey in February. Around 85% of EPO staff took part in the "Your voice, our future" survey, supported by external consultants Willis Towers Watson.

Personal development, empowerment and external reputation emerged as the key drivers of sustainable engagement at the EPO. The survey also highlighted communication with senior management, creating feedback channels and fostering a culture of continuous improvement as areas for improvement.

Engagement is also about defining and communicating a powerful vision that speaks to staff. In June 2019, the EPO's first Strategic Plan 2023 (SP2023) set out an ambitious roadmap for the years ahead. The plan's first goal: "Building an engaged, knowledgeable and collaborative organisation" integrates the survey's findings on staff engagement and defines how we will ensure that it remains part of our DNA.

To increase engagement, we are taking a two-tier approach that combines EPO-wide actions and initiatives at an operational level. To track and co-ordinate these activities, teams were invited to log them in a new online tool. All of our initiatives aim to foster better communication, collaboration, knowledge-sharing and inclusion and diversity.

Towards the end of 2019, the "Your voice matters" project was set up to co-ordinate and improve the way we gather staff feedback and translate it into effective responses. As part of this project, we will also regularly monitor staff engagement levels with pulse surveys and a large-scale survey every two to three years.

This report is the first in a series of annual updates that will chart our progress towards our goals. Looking to the future, the EPO is focused on building a workforce of empowered and highly engaged teams to create a win-win working environment.

# 1. Understanding engagement at the EPO

## 1.1 2019 staff engagement survey

To assess engagement at the EPO, in February 2019 we conducted a staff engagement survey: "Your voice, our future". A total of 5 675 employees – or 85% of staff – took part. This high participation rate confirmed that our staff are keen to voice their opinions. It also provided our external consultants, Willis Towers Watson, with a sizeable and representative data set to analyse.

The survey invited staff to provide input on how engaged, empowered and energised they feel at work on a daily basis. The results were analysed using a model based on the rational and emotional components of engagement and on wellbeing (see Figure 1). This model, developed by Willis Towers Watson, has a clear focus on engagement over time rather than at a particular moment, and so provides a picture of sustainable engagement.

Engaged + Enabled + Energised = Happier colleagues, users and customers

Sustainable staff engagement	Engaged	Enabled	Energised
What it means	To believe in where we're going and be proud to work at the EPO	To have the tools and opportunities to do good work	To have a workplace that supports healthy and inspirational ways of working
What it measures/analyses	Rational, emotional and behavioural attachment to the company	In how far does the work environment support productivity and performance	Individual physical, interpersonal and emotional well-being at work

Source: Willis Towers Watson 2019 report

Figure 1: Sustainable engagement model

## 1.2 Baseline engagement level

With such a high response rate, the survey gave a reliable baseline for EPO-wide engagement. Figure 2 provides an overview of engagement-related survey results and compares our scores with industry and European benchmarks.



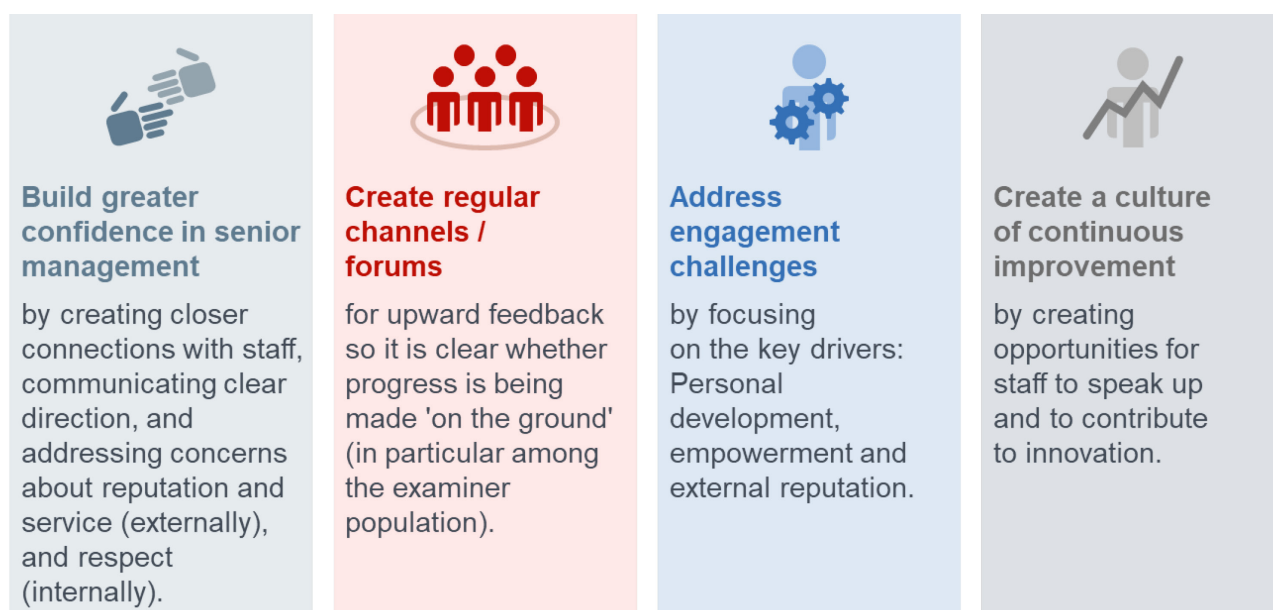
Source: Willis Towers Watson 2019 report

**Figure 2: Breakdown of engagement score responses**

We can be proud of the fact that 75% of our staff are willing to go the extra mile to help us succeed, that 68% believe strongly in our mission and that 64% feel a sense of personal accomplishment at work. However, our relatively low scores in the factors that help to sustain long-term engagement levels are a cause for concern. Specifically, the fact that only 43% of staff see no substantial obstacles to doing their job well, and only 59% can maintain sufficient energy levels throughout the day, highlights the need for improvements in these areas.

### 1.3 Opportunities for improvement

On the other hand, the survey highlighted several areas with scope for positive change, suggesting that we strengthen communication with senior management; improve feedback channels and staff involvement; focus on key drivers of engagement; and foster a culture of continuous improvement and innovation. Figure 3 shows how the opportunities for improvement identified in the survey are grouped into four main themes.

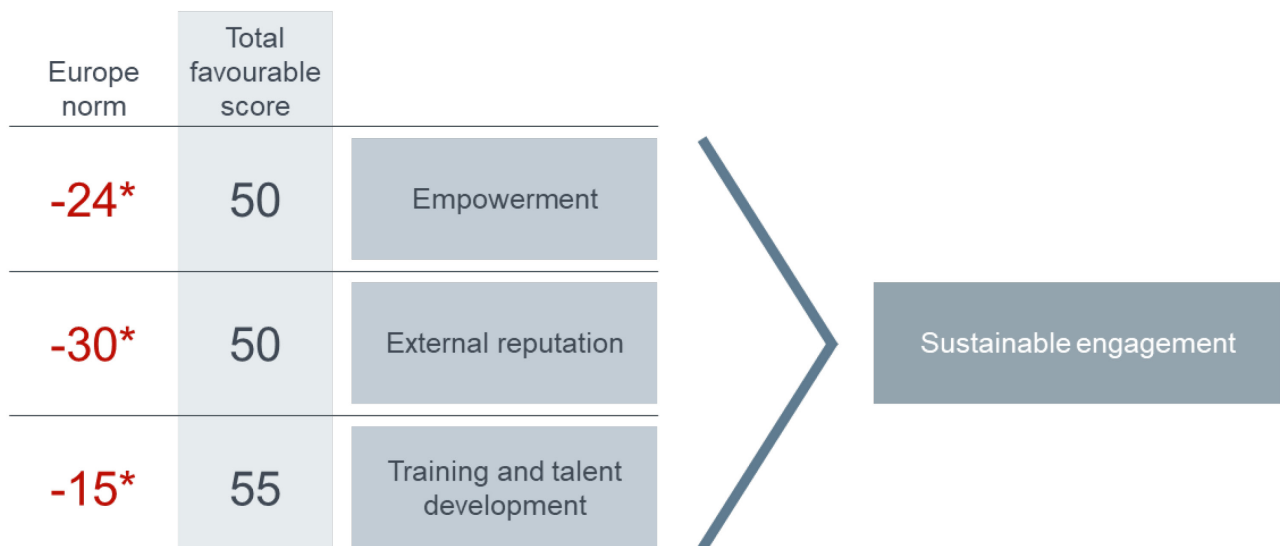


Source: Willis Towers Watson 2019 report

**Figure 3: Summary of key recommendations**

### 1.4 Key drivers of engagement

After conducting a key driver analysis, Willis Towers Watson identified empowerment, external reputation and training and development as the areas with the greatest potential to increase staff engagement (see Figure 4).



Source: Willis Towers Watson 2019 report

**Figure 4: Key engagement drivers**

Empowerment is a key driver of sustainable engagement. The majority of survey respondents said they had autonomy to do their work, but far fewer felt it safe to speak up or that they were encouraged to contribute ideas. The overall results also provided little evidence of a continuous improvement culture at the EPO. We are addressing this feedback with programmes and projects in our Strategic Plan 2023 (SP2023) related to diversity and inclusion, communication, staff feedback and increased collaboration. We are also fostering empowerment through our approach to delivering SP2023, which is highly inclusive and takes the full spectrum of our staff's views into consideration.

According to the survey results, six in ten employees think we have a good reputation for the quality of our services – a decrease compared with staff feedback from 2011. Given that the strength of our external reputation is another key driver of sustainable engagement, this is a further priority for follow-up. Goal 3 of SP2023, to deliver high-quality products and services efficiently, addresses feedback on quality, our service focus and our external reputation.

A sense of personal and professional growth is also crucial to sustainable engagement, but staff feedback on this topic from the survey was predominantly negative. In 2019 the EPO focused on creating more opportunities for professional development by introducing a range of upskilling and job mobility initiatives under SP2023 Goal 1. The implementation of SP2023 has also created considerable scope for staff to take on new roles as project managers or team members and enhance their career prospects by acquiring new skills.

## 2. Embedding engagement in our strategic vision

Following up on the survey results, we deeply embedded our commitment to increasing engagement in SP2023. In late 2019 we created a key performance indicator (KPI) on EPO-wide engagement, which is complemented by KPIs on development and collaboration. Improving engagement and following up on the survey results are targets that feature in each of our vice-presidents' mission statements for 2020 and cascaded down to team level. Three directorates-general and 16 principal directorates have an engagement KPI in their balanced scorecard.

SP2023 and its many programmes and projects were drawn up based on input from a range of stakeholders, including from our 2019 staff engagement survey. Figure 5 shows how the survey results are reflected in the plan's five goals. We expect numerous SP2023 projects to have a positive impact on staff engagement.

Priority areas recommended by Willis Towers Watson	Goal 1	Goal 2	Goal 3	Goal 4	Goal 5
Communication	•				•
Training and talent development*	•	•	•		
Management	•		•		
External reputation* (incl. quality)	•	•	•	•	•
Quality and service focus	•	•	•	•	•
Empowerment*	•	•	•		
Agile culture (incl. continuous improvement and collaboration)	•	•	•	•	•
Diversity and inclusion	•				

**Figure 5: How areas of improvement are reflected in SP2023**



## 2.1 Closing the engagement gap

As explained already, in 2019 our overall score for sustainable engagement was 15% below the European benchmark (see Figure 2). We aim to bridge this gap by 2023 as shown in the table below.

### Targets

	Baseline	2020	2021	2022	2023
Compliance	63%	(66%)*	69%	(73%)*	78%
Excellence	-	(68%)*	71%	(75%)*	80%
<i>* Expected indicator's evolution</i>					
Baseline	The baseline was established in the first half of 2019 through analysis of responses to the EPO-wide staff survey.				
Targets	The targets use an external benchmark for engagement (78%), which is the European norm as calculated by Willis Towers Watson. This value is based on responses given by 360 companies located in Europe. The aim is to achieve a sustainable engagement score comparable to the norm by 2023. We propose a linear progression towards the target that captures the benefits resulting from our various initiatives and programmes as they unfold. Levels of excellence are set two percentage points above compliance.				

We will intermittently conduct pulse surveys of all staff to enable us to monitor engagement organisation-wide. The next full-scale EPO-wide engagement survey is planned for 2021.

### 3. Achievements in 2019: from feedback to actions

#### 3.1 A two-tier approach to engagement

The principles of transparency and ownership governed how we shared the results of our 2019 staff engagement survey and addressed its findings. We have taken a two-tier approach that combines EPO-wide actions with local initiatives (see Figure 6). The survey results were communicated directly to all stakeholders, meetings were held with all managers and staff representatives, and a televised presentation was broadcast to all staff.

After its initial discussion of the survey results, our Management Advisory Committee (MAC) convened three times in 2019 – in July, September and November – to track the follow-up process and review action plans formulated by the central Human Resources project team. MAC members were asked to regularly update the committee and their teams. Responsibility for reporting on individual actions was given to the management level at which they were taken (i.e. unit, directorate-general or SP2023 level). Around 500 reports were generated, enabling managers across the EPO to discuss unit-level findings with their team.

This comprehensive, time-intensive approach was deliberately chosen to involve all staff in the survey follow-up process. We believe that everyone in the EPO has a role to play when it comes to engagement and that sustainable improvements can only be achieved collectively.

#### Two-tier approach

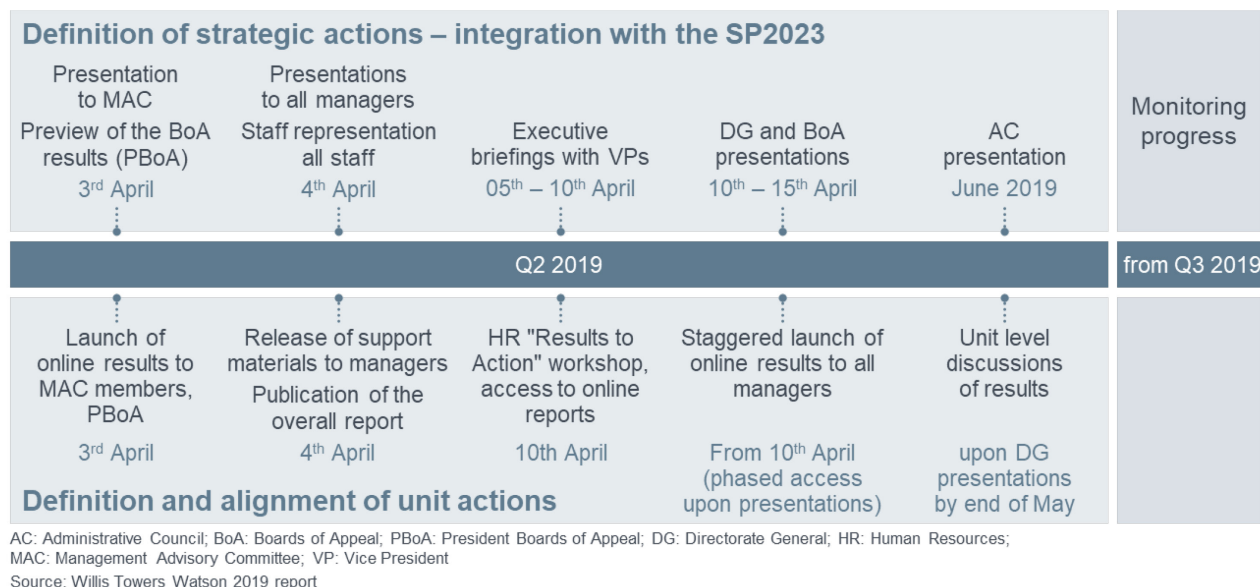


Figure 6: Timeline for survey result follow-up

### 3.1.1 Office-wide actions

One of the first measures we took was to improve communication with staff, forge closer ties with senior management and create multiple opportunities for staff to provide feedback.

**Regular reporting on key senior management meetings** – including meetings of the Administrative Council, MAC, General Consultative Committee and Central Occupational Health, Safety and Ergonomics Committee – has become common practice.

We also launched intranet pages on strategic topics to facilitate informed discussions on SP2023, the Financial Study and the staff engagement survey results. The three sectors in our Directorate-General 1 (DG 1) have followed suit by launching intranet pages to share the initiatives resulting from these discussions.

In 2019 we also put a great deal of effort into setting up **two-way communication channels**. Town hall meetings were held at directorate-general (DG) and principal directorate (PD) level, and members of senior management were invited to attend directorate and team meetings. Focus groups were set up as a platform for employees to give direct feedback on SP2023, the Financial Study and the staff engagement survey. We used their input to tailor future communication campaigns and initiatives. In February the President concluded his one-to-one meetings with staff, bringing the total up to 1 000 individual meetings in the first eight months of his tenure. Over the course of 2019 he also attended informal events with 110 staff to gather their views on a wide range of topics.

In July we launched a new format for managerial discussions: **discovery sessions**. At these sessions the President and vice-presidents invite team managers and directors to exchange ideas on strategic and operational issues and contribute to shaping our strategy. Around 320 managers have attended a discovery session to date. The format has proved highly successful and we plan to hold further sessions in the future.

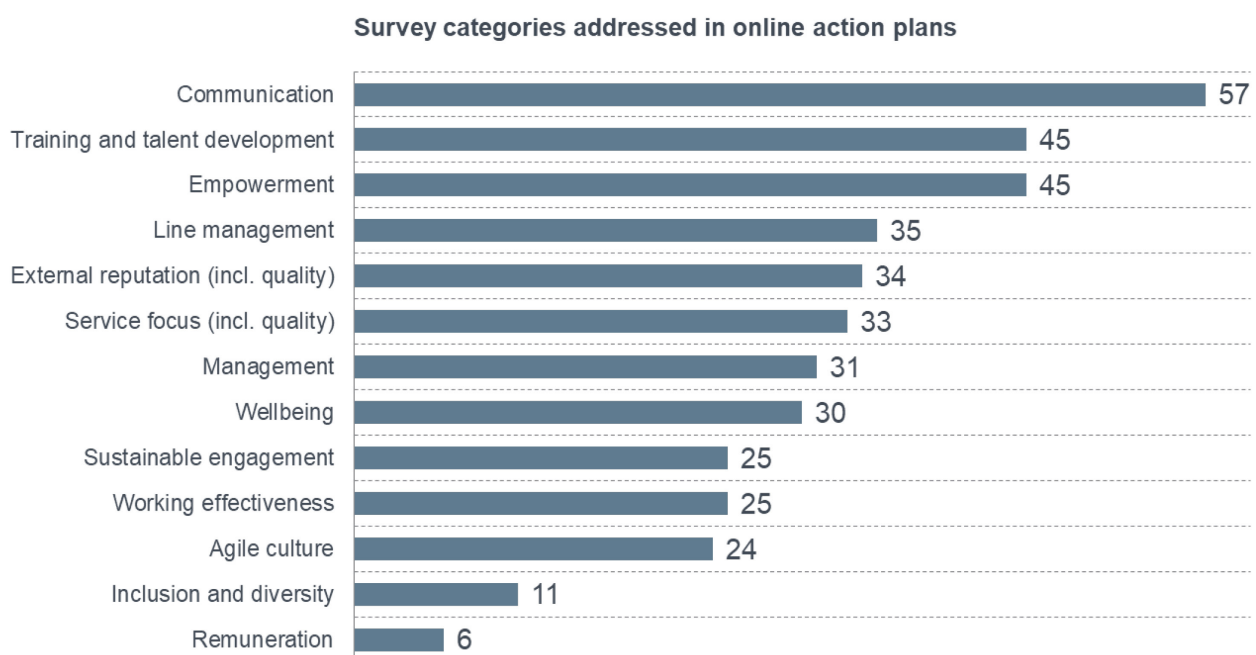
In late 2019 we created a **staff feedback scheme**, which takes the form of an online platform for staff to comment on key operational issues and participate in online discussions. The scheme was launched as a pilot in December when all 350 DG 1 team managers were asked what should be prioritised to improve one of our main search tools for examiners (ANSERA). 148 team managers from across the three sectors actively participated in the scheme, leaving 61 comments and replies covering 124 different topics.

Other office-wide actions started in 2019 included various **diversity and inclusion** initiatives, including a mandatory training module for all managers, and a successful pilot of a new **Women in the lead** mentoring programme with 50 mentees. We also ran an ad-hoc teleworking pilot to give staff greater flexibility and help them strike a better work-life balance.

### 3.1.2 Local actions

At a local level, line managers shared their unit's results<sup>1</sup> with their team in interactive workshops held between April and September 2019. Together with their teams, they then drew up action plans. Action plans were also drafted at DG and PD level, and 82% of all units that received a report recorded their plans in the Willis Towers Watson online tool. Most of the actions initiated in 2019 are set to continue in 2020, and have been integrated into manager and team goals to ensure their implementation.

Analysis of the DG-/PD- and unit-level action plans shows that the engagement drivers most frequently addressed are communication, empowerment, training and talent development, service focus (including quality) and external reputation (see Figure 7 below).



**Figure 7: Survey categories addressed in online action plans of 350 units**

According to the online action plans, around 15% of actions had been completed by the end of 2019. They primarily consisted of team-level discussions of survey results, communicating feedback to senior management and nominating staff members to take responsibility for specific tasks like peer-to-peer knowledge sharing, organising team events, drafting personal development plans and target-setting. The remaining 85% of the actions mainly involve longer-term behavioural changes, rather than quick fixes, and were ongoing at the end of 2019. Team managers also launched platforms to encourage information and knowledge sharing. All of these initiatives aim to improve or change the way we communicate, work and collaborate.

<sup>1</sup> In line with the confidentiality cut-off logic, managers with eight or more responses received a separate report, whilst managers with fewer responses received the next-higher-level report via their manager.

### 3.2 Your voice matters project

Your voice matters, which was approved in December 2019, is a SP2023 project that seeks to enhance our ability to gather, interpret and act on staff feedback. The project will promote a **culture of two-way communication** to ensure that we respond more effectively to staff feedback. This is a precondition for continuous improvement and the EPO's transformation into a learning organisation. Experts, project and line managers, and internal service providers will be offered a range of simple user interfaces for capturing feedback, as well as a recommended survey calendar, clear data protection requirements and expert guidance on surveys and communication.

In the longer term, we will develop a comprehensive listening strategy to capture staff views on their daily workplace experiences and the support they need from internal services. By establishing a clear link between staff input and actions taken by the office, we will show that staff opinions really matter at the EPO.

Knowing that their feedback makes a difference will also motivate staff to actively drive change and increase their sense of engagement and empowerment. The scope of the "Your voice matters" project also includes future surveys to evaluate staff engagement increases against the 2019 baseline.

#### **4. Long-term commitment to engagement**

We are currently undergoing unprecedented challenges that call for major changes in our organisation. In this context, sustainable staff engagement and wellbeing are crucial. We can only fully capitalise on improvements to working methods, tools and processes if our staff are clearly behind them.

Our success, now and in the future, depends on our staff's sense of connection to each other and to the organisation. Fostering this connection is a challenging process that requires constant fine-tuning to reflect changing circumstances. Yet it is also a highly rewarding process of continuous learning and improvement.