

# **A critical review of staff engagement with performance conversations within Hywel Dda University Health Board.**

## **How does psychological safety relate to engagement with performance conversations?**

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**A critical review of staff engagement with performance conversations within Hywel Dda University Health Board. How does psychological safety relate to engagement with performance conversations?**

**Abstract**

This study explored the relationship between psychological safety and engagement with performance conversations. This is a key area of intrigue within the field as it is multifaceted with several factors being highlighted as contributors in the literature (Denny *et al.*, 2019; La Donna & Watling, 2018; London *et al.*, 2023; McCutcheon, & Duchemin, 2020; Mertens & Schollaert, 2023). However, existing literature had not fully explored the role of psychological safety. This is vital to Hywel Dda University Health Board (HDdUHB) as it strives to engage staff with effective performance management (Gostling, 2020) which enables safe and efficient patient care (HDdUHB, 2018), training and retention (HEIW, 2023), under significant financial constraints (HDdUHB, 2024b). A mono-method questionnaire strategy was utilised to gain quantitative and qualitative data (Hammond & Wellington, 2021; Saunders, Lewis and Thornhill, 2023), which could be explored deductively and inductively through the critical realism lens (Fletcher, 2017).

Psychological safety was found to be significantly positively related to engagement with performance conversations. Manager behaviours and emotional intelligence were also related. Eight key themes were identified as barriers and enablers of engagement with performance conversations. Whilst staff from the Workforce Directorate reportedly experience more regular performance conversations than those reported by Sayers *et*

*al.* (2018), there were inconsistencies with the frequency, perceived purpose and content of performance conversations which resulted in positive and negative emotional associations with performance conversations. Contrasting with Raišienė *et al.* (2020), no difference was found for engagement with performance conversations across time spent in the physical office or the location of the performance conversation.

These findings have several implications including that they provide an enhanced understanding for future researchers on the relationship between psychological safety, emotional intelligence, manager behaviours and engagement with performance conversations. HR professionals can better understand their ability to influence engagement with performance conversations and they offer insight to HDdUHB and managers on how to foster and enable engagement with performance conversations.

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## **1. Introduction**

### **1.1 Background**

Hywel Dda University Health Board (HDdUHB) is a public sector, healthcare organisation in South West Wales which employs 11,923 staff (HDdUHB, 2024a). HDdUHB's population is predicted to rise (ONS, 2024), with a high volume of residents being elderly (HEIW, 2024a). To adapt (McKee *et al.*, 2021), the HDdUHB (2018) strategy outlined plans to reduce reliance on acute sites. This is delayed (HDdUHB, 2024b), due to financial constraints (Betteley, 2024).

Crucially, HDdUHB must maximise return on investment in staff, by managing performance (Young, 2024) to enhance potential (Gifford, 2024a). Especially as HDdUHB strives to make changes during targeted intervention (Welsh Government, 2024). Pertinently, NHS Wales is struggling with retention and has a vacancy rate of 5.7% (Howell, 2024). Comparatively, labour trends suggest UK vacancy rates are reducing but it is acknowledged that hard-to-fill vacancies are still prevalent (Cockett, 2024). It is believed 80% of the future workforce already work for HDdUHB (2018) which emphasises the importance of development (Gifford, 2024a), and retention which is a current focus within NHS Wales (Howell, 2024).

Recent labour market trends suggest more employers within the public sector are increasing staffing levels (Cockett, 2024). Contrary to the current position within HDdUHB (2023) as it strives to make savings with a freeze on non-essential recruitment. Reflecting labour market trends, HDdUHB has a high volume of hard-to-fill

vacancies (Cockett, 2024). 40% of employers with hard-to-fill vacancies are seeking to upskill their workforce (Webber, 2024). This supports the argument for effective performance management (PM) (Gifford, 2024a).

PM consisting of informal conversations and formal annual appraisals (Mertens & Schollaert, 2023), was highlighted in guidance to NHS Wales employers as essential to retain and upskill staff (HEIW, 2023). Despite this, Welsh Government monitor compliance with annual reviews and HDdUHB has improved compliance by 5.6% over the last year (HDdUHB, 2024a). However, a focus on this measure could detract from the purpose (Denning, 2021) as annual reviews focus on one element of PM (Gifford, 2024b). Interestingly, recent staff survey results suggest whilst the majority had experienced an appraisal within the last year, 27% felt it did not make them feel valued, 38% felt it did not improve their performance and 23% did not feel they had clear objectives (NHS Wales, 2025). Thus, implying these appraisals are not effective.

Performance conversations (PCs) are another element of PM which can inform learning and development, motivate and enable exploration of challenges (Gifford, 2024b). Regular feedback on performance can enable mastery of skills and influence staff experience, perceived job security, and prevent burnout (Parker *et al.*, 2024). This is notable, given Ockenden (2022) highlighted staff training, accountability and learning from incidents as key factors which contributed to the failures within an NHS Trust. HDdUHB (2022) acknowledge that to enable the delivery of high-quality patient care, all

staff must experience effective PM which is underpinned by agreed priorities, a clear understanding of their role, development and application of skills and knowledge.

## 1.2 Rationale

The Workforce, Education and Organisation Development (WFOD) Strategy highlights that PM mechanisms should enable high performance evident in ability to raise concerns, question and generate ideas (Gostling, 2020). Complimentary, HEIW (2023) guidance encourages regular communication which develops understanding of motivating factors, seeking feedback, and involves staff in decision making. The PM policy highlights that engagement with PM including annual reviews and feedback conversations is the responsibility of all employees and line managers should role model behaviours which support a performance led culture (HDdUHB, 2022). This would enable leaders to effectively support the organisational strategy by enabling their team to work effectively, utilise staff strengths, and develop skills and knowledge to maximise performance (HDdUHB, 2018). Current Performance Appraisal Development Review (PADR) compliance within WFOD is 84.5% (HDdUHB, 2024a). Despite evidence within the field, CIPD research discovered only 64% of respondents received useful feedback from their line manager (Brinkley, 2024). PM which extends to quality feedback and accountability for meeting objectives is rarely experienced (Beatson, 2023). Creation of processes by HR does not guarantee engagement (O'Kane, McCracken, and Brown, 2023).

Recent HDdUHB staff survey results suggest whilst scores for development and PADR's have risen compared to 2023, they are still lower than the NHS Wales average (NHS Wales, 2025). Thus, whilst HDdUHB communicates espoused values and outlines policy and procedures surrounding effective PM, this may not be what is seen within the culture of the organisation (Schein & Schein, 2017).

To raise concerns and challenge, which is essential in the NHS (Ockenden, 2022), individuals need to feel psychologically safe (Sidani & Reese, 2020). Psychological safety (PS) is a shared belief that it is safe to take risks, express ideas, voice concern and admit mistakes without fear of consequences (Gallo, 2023). The recent tragic and harmful behaviour of Letby (Thirlwall, 2023) magnifies the importance of PS (Edmondson, 2019b), enabling challenge, raising concerns (Sidani & Reese, 2020) and effective engagement with feedback (Desveaux, Rosenberg-Yunger, and Ivers, 2023). The enquiry will seek to examine the wider NHS by exploring relationships between professionals, culture in hospitals and how this affects patient safety (Thirlwall, 2023). Considering this and the *Worker Protection (Amendment of Equality Act 2010) Act 2023*, which updates the law to highlight the need for employing organisations to take steps to prevent sexual harassment of its employees, the relevance of PS as a factor in engagement with feedback that drives desirable behaviours and performance is incredibly relevant to HDdUHB and the wider NHS (Rees, 2023). Effective PM can address unwanted behaviours (Gifford, 2024b), before they cause harm (Ockenden, 2022). HDdUHB is currently working on fulfilling these requirements (HDdUHB, 2024c). However, the 2024 NHS survey results indicate the ability to speak up was scored lower

in HDdUHB compared to other NHS Wales organisations (NHS Wales, 2025), despite having higher PADR compliance (HDdUHB, 2024a).

Considering the importance of effective PM to retention (HEIW, 2023) and enabling performance (Zamri *et al.*, 2021), which is significant to HDdUHB given the strategic outlook (HDdUHB, 2024b) and the legal ramifications of a lack of effective PM (*Worker Protection (Amendment of Equality Act 2010) Act 2023*). It is evident that research is needed into current engagement with PCs and the contribution of PS (Gallo, 2023).

### 1.3 Aims and Objectives

This research aims to investigate staff engagement with PCs and the role of PS within WFOD. It will explore the research question: “*what is the role of PS in staff engagement with PCs?*” It is hypothesised that PS will be positively related to engagement with PCs.

The objectives include:-

1. To define, research and critically review PCs and the concept of PS utilising existing literature and secondary data, from internal and external sources.
2. To analyse staff engagement with PCs through primary research collected utilising a questionnaire.
3. To investigate the relationship between PS and staff engagement with PCs through primary research.
4. To identify perceived barriers to engaging with PCs through primary data.

5. To propose recommendations to strengthen engagement with PCs to support enhanced performance within HDdUHB.

The research will support HDdUHB to understand current engagement with PCs and how to progress (Cioca & Gifford, 2022). Complimentary to ongoing retention work (HEIW, 2024b), it will strengthen understanding of practices and cultures surrounding PCs which may support retention and enable the wider NHS to gain insight into PM practices (NHS Employers, 2024). It will expand on research in the field by exploring engagement with PCs (O’Kane *et al.*, 2023), analysing the role of PS (Edmondson, 1999; Ajjawi *et al.*, 2022), with human resources staff in a healthcare setting. It will also expand on the findings of Mertens & Schollaert (2023), and explore the gap in the research highlighted by Brown *et al.* (2019), by utilising quantitative data to ascertain the relationship between time spent in the office on engagement with PCs.

Objective one will be explored in Chapter Two, followed by analysis of the research methods utilised in Chapter Three. Chapter Four will layout the findings against the research objectives, leading into Chapter Five which will discuss the findings, draw conclusions to the objectives and propose recommendations for HDdUHB.

## **2. Literature Review**

### **2.1 Introduction**

This chapter aims to address objective one and begin the exploration of the barriers by critically reviewing relevant literature. It will introduce the field of PM, define PCs, and critically evaluate the barriers and enablers of engagement with PCs. Following this, it will define the concept of PS and critically review the relationship between PS and engagement with PCs. Finally, the chapter will collate these findings to address objective one and highlight gaps in the literature for investigation.

### **2.2 Performance management**

PM is an umbrella term used to describe activities which establish objectives, hold people accountable and improve performance (Gifford, 2016), congruent with the organisations' vision (Sayers *et al.*, 2018). Traditional PM approaches, such as appraisals, are controversial as they can weaken motivation and poor experiences can negatively impact views on PM (Wigert & Harter, 2017), subsequently leading to disengagement (Murphy, 2020). Contrastingly, Saunders, Lewis and Thornhill (2023) suggest it is the manager's engagement with PM that impacts employee beliefs, views and consequent engagement. Whilst PM practices are controversial, it is generally agreed that PM systems require transformation away from the traditional annual review to be most effective (Mertens & Schollaert, 2023). Rather, effective PM encompasses feedback which is detailed, constructive, explicit, and encourages regular ongoing feedback through formal and informal methods (Brown *et al.*, 2019). Historically,

HDdUHB focused on annual appraisals but effort has been made to shift culture to regular engagement with PCs, but this is not measured (HDdUHB, 2025b).

### 2.3 Performance conversations

Blackman *et al.* (2022) define PM as an ongoing informal conversation between the appraisee and appraiser. Conversely, others argue that PCs are an element of PM (Gifford, 2024a). They involve regularly reviewing goals (West & Wallbank, 2025), through informal, two-way, feedback discussions (Gifford, 2024a). This is crucial for continuous improvement and the delivery of high-quality patient care (Thornton, 2024). Contrastingly, formalised feedback can be perceived as bureaucratic and negate from the learning opportunity (La Donna & Watling, 2018). PCs arguably have a positive relationship with employee performance (Zamri *et al.*, 2021) by motivating and improving job satisfaction (Beatson, 2023). Feedback can also enable staff to feel listened to, acknowledged and supported (Hallam, Popovic and Karimi, 2023). Conversations which are sincere and autonomously driven enable problem solving and organisational learning (Sidani & Reese, 2020). These positive findings may be why Blackman *et al.* (2022) adopted a modern definition for PM which focused on the PCs element.

Despite the argument against traditional reviews (Mertens & Schollaert, 2023; Gifford, 2024a; La Donna & Watling, 2018), research conducted predominantly on HR managers, found 22% of respondents reported experiencing monthly PCs, with annual discussions being more common (Sayers *et al.*, 2018). However, 40% of respondents



believed these meetings should occur more frequently (Saunders *et al.*, 2023).

Supporting the argument that frequency is related to effectiveness (Sleiman *et al.*, 2020) and staff engagement (Wigert & Harter, 2017).

There is counterargument that quality (Cioca & Gifford, 2022) and holistic nature (Gifford, Urwin and Cerqua, 2017) are important. PCs can be utilised by managers to ensure employees basic needs are met, build trust and belonging, recognise strengths and support development to self-actualise (Maslow, 1954; Ihensekien & Joel, 2023). PCs enable managers to coach appraisees, provide recognition and identify areas for improvement (Armstrong, 2017). Whilst frequency is generally accepted as important, particularly for individuals learning a new role or skill, practical constraints can limit managers ability to engage in frequent PCs (Johnson, Johnson, and Dave, 2023). However, emphasis on necessity of process rather than embedding frequent conversations could negate from effectiveness (La Donna & Watling, 2018). This is apparent in HDdUHB where PM is culturally considered a '*tick-box exercise*' (HDdUHB, 2024d).

#### 2.4 Honest feedback

Negative feedback is an important element of leadership (Goleman, 2020). Whilst positive feedback has been shown to be effective (Sleiman *et al.*, 2020; Gifford *et al.*, 2017) uncomfortable conversations surrounding changes in performance (NHS Employers, 2024) and concerns (Ockenden, 2022) are necessary. Failure to address

concerns could result in good performers becoming demoralised or leaving the organisation (Brown, Kulik and Lim, 2016; Mertens & Schollaert, 2023).

Ineffective feedback can be counterproductive and harmful to performance (O’Kane *et al.*, 2023). Research suggests PM practices should seek to coach staff rather than judge (Murphy, 2020). Complimentary to this argument, Brown *et al.* (2016) note that PCs require individuals to appreciate and respect difference, question actions, collaborate and contribute to two-way discussion. Encouraging interactive dialogue can promote PS (Johnson, Keating, and Molloy, 2020). Notably, all feedback should be a conversation rather than a written exchange as this can result in a missed opportunity to gain clarification or respond (Goleman, 2022).

Effective PCs require a clear, shared understanding of what the individuals hope to achieve during the conversation (Blackman *et al.*, 2022). HR practitioners have highlighted that managers often avoid or lack the skills to provide feedback (Brown *et al.*, 2019). Conversely, Molloy *et al.* (2020) argue that the misconception feedback is an appraiser skill is damaging as effective feedback requires the learner to be engaged and perceive it as useful. Arguably, both parties need upskilling to ensure engagement with honest conversations (O’Kane *et al.*, 2023).

## 2.5 Engagement with performance conversations

Engagement has several meanings, in this context, it is “*the fact of being involved with something*” (Cambridge Dictionary, 2024). Whilst there is no respected

instrument to measure engagement with PCs, measures have been devised for cognitive, emotional aspects (Mayordomo *et al.*, 2022), interaction with learning, feedback and resources (Carvalho *et al.*, 2015). Measuring engagement is multifaceted and encompasses a range of concepts (Young, 2024). Engagement with PCs can mean employee participation during the conversation and application of feedback post conversation (Abraham, 2023). Engagement can also involve feedback seeking behaviours which are related to effective PM (Schleicher & Baumann, 2019) and goal achievement (Rabbani & Alavi, 2023). Arguably, output after feedback is a greater indicator of their engagement with the feedback than the conversation itself (Molloy *et al.*, 2020).

Enabling engagement with PCs is the responsibility of all individuals within an organisation, including the manager and appraisee (Abraham, 2023). Whilst HR can facilitate PM, buy-in from all staff is required for it to be successful (O'Kane *et al.*, 2023).

## 2.6 Role of the appraisee

Previous experiences can make people wary of being vulnerable to feedback experiences (Denny *et al.*, 2019). Two-way conversation which enables the individual to express their perspective and facilitate reflection can increase the likelihood of the individual acting upon feedback (Duitsman *et al.*, 2019). However, a study found doctors engaged in feedback filtering behaviours whereby they were more likely to seek feedback if they thought it would be positive and avoid negative feedback which

contradicted self-perception to protect their professional identity (La Donna & Watling, 2018). Resulting in not all feedback being actioned (Fredette *et al.*, 2021; La Donna & Watling, 2018).

Appraisees can present as feedback seeking or avoidant due to individual traits (Cioca & Gifford, 2022) including attachment style (London *et al.*, 2023), culture and relationship with appraiser (Fredette *et al.*, 2021). Expanding on this, the performance of teams is improved when high power, senior members have high familiarity (Avgerinos, Fragkos, Huang, 2020). Therefore, hierarchy and familiarity are important to consider, which is notable for HDdUHB and the wider NHS, given their hierarchical structures (West & Wallbank, 2025). Possibly due to concern that seeking feedback could be mistaken for a lack of confidence or reduce future autonomy (La Donna & Watling, 2018). Feedback seeking and self-disclosure of limitations should be normalised to support effective PCs (Ramani *et al.*, 2017). An employee's engagement with PCs can be impacted by how the feedback is perceived (Cioca & Gifford, 2022) or understood (Abraham, 2023). However, extensive research within the field highlights a range of reasons beyond these that impact engagement with PCs (Cioca & Gifford, 2022).

Employees need to be intrinsically motivated, have an awareness of how to act upon feedback, and feel equipped and supported (Abraham, 2023). Supporting this, Denny *et al.* (2019) note, the extended relationship is an enabler, but convergence of learning goals is required along with the use of effective strategies to deliver

corrective feedback. However, intrinsic and extrinsic motivators are both important and isolating them may prevent the ability to support all needs (Ihensekien & Joel, 2023). Whilst motivation and relationship are factors in engagement, other factors, such as cultural (LaDonna & Watling, 2018) and linguistic differences, can pose barriers to effective communication and feedback (Thornton, 2024).

## 2.7 Role of the appraiser

Arguably managers are essential to effective engagement as they can influence employee perceptions, attitudes, cooperation, and perceived fairness (Schleicher & Baumann, 2019). Within HDdUHB, possessing leadership qualities is not a prerequisite of management responsibility and the staff survey suggests some managers are not equipped with leadership skills (NHS Wales, 2025). Managers could benefit from both management and leadership skills to apply a firm understanding of human behaviour to enhance team performance (Gavin, 2019).

Micromanagement and control styles are not favourable among employees, whereas autonomy, trust and empathy resonate with employees (Lee, 2021). Specifically, the managers' agreeableness, demeanour and credibility contribute to the likelihood of engagement with PCs (Fredette *et al.*, 2021).

Research also shows that managers can find delivering negative feedback problematic (Brown *et al.*, 2016) which is another barrier to engagement with PCs as the appraiser may avoid the conversation due to fear of damaging rapport (McCutcheon, & Duchemin,

2020). Research focusing on managers' experiences with providing feedback found that despite being experienced with PM, managers experienced anxiety around providing feedback which could be poorly received (Brown *et al.*, 2016). To overcome this, managers can resort to utilising different techniques, such as sandwiching negative feedback between positive, which can cause confusion, evade the truth (Hirsch, 2020) and lead to misunderstanding (Duitsman *et al.*, 2019). There is general agreement that there is no beneficial effect on performance in utilising these techniques (Johnson *et al.*, 2023).

Reframing constructive feedback from being a difficult conversation to an honest conversation may enable managers to overcome this (Thornton, 2024). Arguably, frameworks can ensure clarity (Besse & Vogelsang, 2018) as congruent feedback is more effective than mixing negative with positive (Johnson *et al.*, 2023). Whilst managers believe the different approaches they utilise to deliver negative feedback are effective, this may not be the employee perception (Brown *et al.*, 2016). Whilst applying a framework or utilising a strategy may support feedback on the surface, they will not enable improved care due to contextual factors also contributing (Desveaux *et al.*, 2023). Therefore, underlying barriers to engagement with meaningful feedback are not addressed by utilising a framework alone (McCutcheon, & Duchemin, 2020) and could be tokenistic (Molloy *et al.*, 2020).

Feedback should also be tailored to the needs of the individual to engage them with the process (Marchington *et al.*, 2021) and ensure feedback meets holistic needs

(Ihensekien & Joel, 2023) such as neurodiversity (Thompson, 2024). Even when feedback is carefully thought out, it can be perceived as unfair or invalid, due to its subjective nature (Murphy, 2020). Which can result in unfavourable employee reactions (Brown *et al.*, 2019) which may be predicted by level of trust (Schleicher & Baumann, 2019). Managers can enable self-awareness by communicating through a person-centred approach (Brown *et al.*, 2019) ensuring they are nonjudgemental (Ramani *et al.*, 2017), transparent, and convey the value of the outcome and the expectation (Blackman *et al.*, 2019).

## 2.8 Contextual factors

It is notable that hybrid working has increased within WFOD since the pandemic (HDdUHB, 2024a) as relationships have been highlighted as significant factors (London *et al.*, 2023; Hirsch, 2020). There is limited understanding of the effectiveness of feedback in the virtual environment (Brown *et al.*, 2019). However, research which interviewed HR managers found the shift from office working during COVID disrupted regular PM practices but organisations which utilised a combination of formal and informal approaches were more adaptable due to system resilience (Mertens & Schollaert, 2023). This is significant to HDdUHB because NHS Wales organisations should take a combined approach to PM to support staff retention (HEIW, 2023). Similarly, other research conducted exploring the shift from office to home working found that managers could demonstrate employee care through feedback, timely and specific information sharing, and two-way conversations which contribute to positive emotions, PS and supports the perception

of fairness (Lee, 2021). However, a lack of informal opportunities in the digital space could reduce the occurrence of PCs (Mertens & Schollaert, 2023). This is crucial because a lack of feedback is reportedly a prominent side effect of remote working (Raišienė *et al.*, 2020).

Wider contextual factors, including a sense of belonging and a culture of supportive feedback can enable engagement with PCs (Denny *et al.*, 2019) and enhance the development of these factors (O’Kane *et al.*, 2023). Given the pace of the healthcare environment, having time to engage in PCs is key (McCutcheon, & Duchemin, 2020). Whilst acknowledging the structural and system challenges, the NHS staff survey emphasised the importance of cultural changes which enable compassionate care (West & Wallbank, 2025). Continuous improvement can support PS and subsequent engagement with PCs (Johnson *et al.*, 2020).

To engage fully, employees need to be willing to be vulnerable to display their concerns and issues to the appraiser or it risks being staged (La Donna & Watling, 2018). A potential explanation for the employee being unable to embrace vulnerability surrounds relationship factors including power issues and a fear of the effect of corrective feedback (Denny *et al.*, 2019). To overcome the risk of meaningless or threatening feedback, culture change can embrace vulnerability and inspire honest conversations (LaDonna & Watling, 2018). However, culture is a complex construct concerned with attitudes, beliefs and behaviours (Schein & Schein, 2017). Culture change requires time and engagement (Schein & Schein, 2019).



## 2.9 Psychological safety

When PS is present individuals are not hindered by the possibilities of negative consequences, outcomes or failure and are able to take risks despite the potential outcomes (Edmondson, 2019b). This could be due to confidence they will not be disrespected for making an error or speaking up (Sidani & Reese, 2020). PS is concerned with a group norm and trust is concerned with the individual (Newman, Donohue, & Eva, 2017). Interestingly, it has been shown to be a mediator in ability to engage with learning behaviours (Alam & Singh, 2021). PS allows for learning as individuals contribute their ideas freely and openly with a willingness to learn from each other (Sidani & Reese, 2020) and is associated with performance (O'Donovan & Mcauliffe, 2020). It enables individuals to engage with constructive conflict, seek feedback and engage with open communication (Newman *et al.*, 2017). Thus, PS is an enabler for safe, effective, quality care but it requires individuals to be committed and to feel a sense of urgency to be effective (Edmondson, 2020).

Coupled with this, is the need for commitment to high standards to ensure individuals are ready to learn and develop rather than stay comfortable, be apathetic or struggle with feelings of anxiety about the situation they face (Bevan, 2021). PS is of particular importance in the high-pressure healthcare environment (Hallam *et al.*, 2023) to minimise errors and enable innovation (Grailey *et al.*, 2021). A qualitative study found effective communication, organisational culture, leadership practices, feedback mechanisms, respect among colleagues, staff development opportunities, teamwork, and trust to be contributing factors to PS (Hallam *et al.*, 2023). Notably, whilst feedback

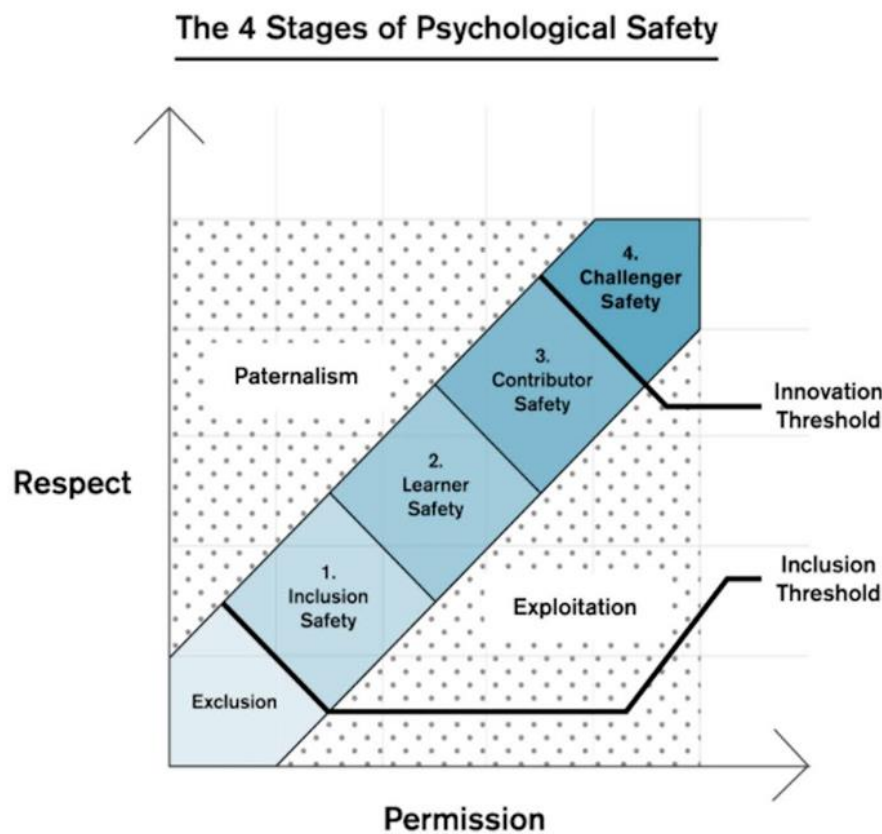
is considered important, the leaders' capacity and approach to providing appropriate and timely feedback is essential to support PS (Hallam *et al.*, 2023).

Leaders are accountable for PS within their team (Clark, 2020) as they can influence how team members view mistakes (Lee, 2021) which enables staff to learn without blame (Edmondson, 2019a). Enabling the team to engage with reflexivity supports collective learning, improves work, and supports wellbeing within the team (West, 2021). Specifically, role modelling the desired behaviours and encouraging participation in quality improvement can positively impact PS through being open and accessible which facilitates learning from failure (Desveaux *et al.*, 2023). Compassionate leaders focus on clearly communicating the vision, supporting others and uniting team members towards shared goals (West, 2021). Interestingly, when leaders show vulnerability by admitting their limitations, they strengthen the relationship and support employees to do the same (Denny *et al.*, 2019). However, harnessing PS goes beyond the leader to encompass intrapersonal, interpersonal and sociocultural factors (Ajjawi *et al.*, 2022).

Whilst PS can be influenced by team leaders, other factors across the organisation, team and individual levels are complexly interacting (Grailey *et al.*, 2021). Notably, individuals with higher seniority in an organisation are more likely to experience PS (O'Donovan & McAuliffe, 2020). Whilst Grailey *et al.* (2021) argue that factors associated with PS are difficult to change, O'Donovan & McAuliffe (2020) argue that PS culture can be enhanced through interventions within healthcare teams. However, the

importance of relationships and trust should not be underestimated (Schein & Schein, 2019) rather than a focus on intervention alone (O'Donovan & Mcauliffe, 2020).

The four stages model can be applied to explore PS as a multi-layered dynamic (Clark, 2020).



*Figure 1: The four stages model. (Clark, 2020).*

However, it has been criticised for lacking empirical evidence and being linear as PS is multi-dimensional and would not necessarily be sequential (Geraghty, 2021).

Despite this, it provides a useful way to understand the benefits and challenges that PS can pose depending on the permission and respect levels within the team (Clark,

2020) which was highlighted as a gap in the literature (Newman *et al.*, 2017).

Recent literature posits belonging and inclusion are key to PS and Clark (2020) could be refined to illustrate the integrated, iterative, and recursive nature of PS (Van Tuyl, Walinga, and Mandap, 2024).

To further aid understanding of PS safety within the context of feedback, radical candor (RC) can be explored (Scott, 2019).



Figure 2: Radical candor (Scott, 2019).

RC describes proactive and compassionate engagement with feedback (Vich & Kim, 2016). It occurs where challenging directly and caring personally intersect (Scott, 2019). RC can be thought of as compassionate candor because leaders need to

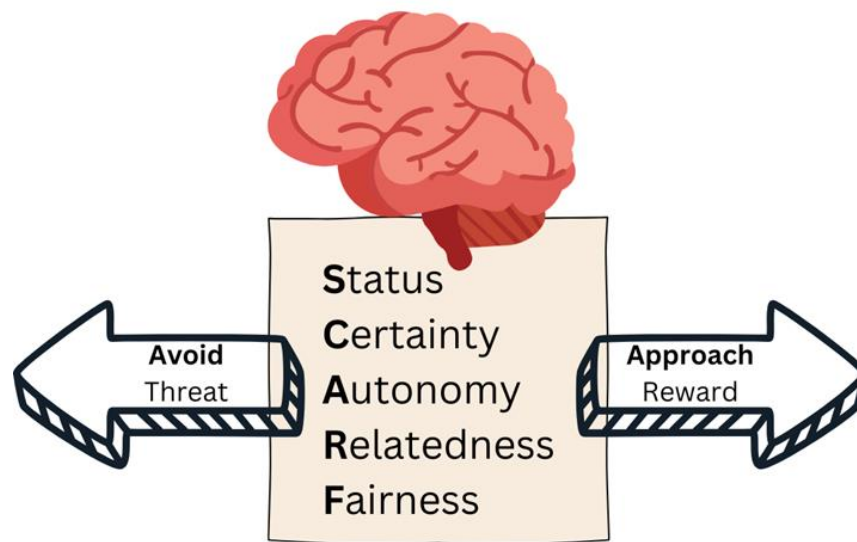
establish a style which is compassionate and enables innovation and collaboration rather than utilising command and control (Scott, 2024). RC may help reduce the influence of psychological factors including extreme levels of attachment, harsh emotions or low self-esteem to enable engagement with negative feedback (Vich & Kim, 2016). Leaders should avoid narrowly focusing on being empathetic as challenge is necessary (Scott, 2024). Supporting this, Mharapara and Staniland (2020) found utilising RC to provide feedback enables the recipient to appreciate it as a bespoke evaluation of their work rather than a personal appraisal. Moreover, being kind, calm and direct about the specific behaviour in a depersonalised way can enable a shared understanding on how to perform in future and address the issue without accusation or judgement (Thornton, 2024). Considering both theories, the themes of care personally and permission; challenge directly and respect can be grouped to provide deeper understanding of the complex dynamics involved in PS and engagement with PCs.

#### 2.10 Relationship between psychological safety and performance conversations

PS is a contextual factor which impacts feedback seeking behaviours (Desveaux *et al.*, 2023). This interaction can be two-fold, with some suggesting high quality listening and PS are conducive to positive relationships and quality feedback which can in turn strengthen PS (London *et al.*, 2023). When partnership is a driver of PCs rather than hierarchy, the relationship between the manager and employee is improved and feedback is not feared (Hirsch, 2020). Thus, reducing the power gap and being an ally to the individual can promote PS (Johnson *et al.*, 2020).

Considering cognition, the human brain utilises two systems; system one which is automatic and makes quick assumptions utilising biases to perform at pace and system two which requires attention and effort to utilise the frontal cortex to aid rational decision making (Kahneman, 2012). Applying this notion to PCs, when feedback is perceived as threatening, it can trigger an emotional response from the amygdala which overrules rational thinking and triggers the fight or flight response (Goleman, 2020). Individuals can minimise this by taking time to engage with rational thinking before reacting (Stewart, 2022).

The status, certainty, autonomy, relatedness, fairness (SCARF) model (Rock, 2008) can provide insight into human behaviour surrounding feedback and how teams can function more effectively by applying the model to enable individuals to be in approach state rather than avoid (Rock, 2008). Thus, corroborating with Kahneman (2012).



*Figure 3: The SCARF model (Rock, 2008).*

Applying SCARF (Rock, 2008), people can reflect on behaviour or proactively consider responses and reduce the occurrence of emotional responses (Stewart, 2022). The model posits that humans are primed to check social elements of situations due to their need for belonging and wanting to ensure they avoid social exclusion (Rock, 2008). Supporting the argument that social elements are prioritised as important by the brain, neuroimaging has shown social rejection and physical pain to have similar brain activity (Rock, 2009). It should be noted that the mindset of individuals can also be a factor in feedback receptivity, even if the leader takes time to consider the elements of the SCARF model (Rock, Jones and Davis, 2013). Supporting this argument, the application of the SCARF model can enable leaders to deliver feedback which employees engage with (Hansen, Hansen and Madsen, 2022).

Strategies can minimise the confrontational impact of corrective feedback and appraisers would benefit from upskilling in techniques to give corrective feedback in ways that minimise threat (Denny *et al.*, 2019). Self-awareness is a key quality for leaders to ensure they reduce the occurrence of a SCARF response (Rock, 2009). Notably, when delivering constructive, honest feedback, leaders can remove emotion from the situation by avoiding making it personal by referring to facts and preferred behaviours rather than the person themselves (Thornton, 2024). Negative emotional language can focus the recipient's attention onto themselves rather than on the behaviour or task being discussed and has been shown to decrease performance (Erickson *et al.*, 2022).

Whilst the literature indicates PS is related to engaging with PCs (Desveaux *et al.*, 2023; London *et al.*, 2023; Thornton, 2024), there are limited studies which explore factors which may interact with PS to predict different outcomes (Newman *et al.*, 2017).

### 2.11 Emotional intelligence

Emotional intelligence (EI) was defined as an ability-based construct concerning an individual's ability to evaluate and regulate emotions in themselves and others (Salovey & Mayer, 1990). Progressively, the concept became multidimensional, spanning trait, ability and a mix of ability, competency, and trait (Bru-Luna *et al.*, 2021). It has been highlighted to be an important factor to PM as it is positively



related to transfer of learning and could mediate the effects of organisational climate on the transfer of learning (Oluwafemi & Ametepe, 2023).

Supporting this, Alam and Singh (2021) suggest individuals with higher levels of EI are better able to regulate emotions and this can mediate PS and subsequent learning behaviours that emerge after PCs. Recipients of feedback that have the EI to frame feedback as an opportunity rather than an adverse situation are better able to receive the feedback (Goleman, 2020). This supports the notion that mindset is key to receptivity of feedback (Rock *et al.*, 2013) and utilising rational thinking rather than impulsively allowing the historical protectors within the brain to take control (Kahneman, 2012). It can also be useful to the appraiser, as being aware and sensitive to the appraisees emotions and having empathy are key to delivering feedback which avoids creating emotional upheaval (Goleman, 2020).

## 2.12 Conclusion

PCs are a driver of continuous improvement, employee performance (Zamri *et al.*, 2021) and patient care (Thornton, 2024). Despite support for engaging with PCs (Ihensekien & Joel, 2023; O'Kane *et al.*, 2023; La Donna & Watling, 2018), ACAS data suggests this is not always achieved in practice (Sayers *et al.*, 2018). It is evident that multiple factors concerning the individual (London *et al.*, 2023), manager (Schleicher & Baumann, 2019) and culture (Denny *et al.*, 2019) are involved in engagement with PCs (Fredette *et al.*, 2021).

The SCARF model offers insights into the complexity of human behaviours and the different elements that can lead to engagement or avoidance of PCs (Rock, 2008). Whilst the literature supports the notion that PS is a key factor in engagement with PCs (O'Donovan & Mcauliffe, 2020) and a mediator between being able to regulate emotion and engage with learning behaviours (Alam & Singh, 2021), this review has highlighted a lack of research surrounding the interaction between PS, EI and engagement with PCs (Newman *et al.*, 2017). This is significant because there is some evidence that EI is involved in engagement with PCs. Specifically, emotion regulation can mediate PS and subsequent learning behaviours (Alam & Singh, 2021; Oluwafemi & Ametepe, 2023).

Therefore, this research will seek to address the gap in the research surrounding the relationship between PS, EI, manager behaviours and engagement with PCs. It will seek to support the extensive literature on the role of the appraiser (Schleicher & Baumann, 2019) and expand on the findings of Mertens & Schollaert (2023) and Brown *et al.* (2019) by utilising quantitative data to ascertain the relationship between remote, hybrid or office-based roles on engagement with PCs.

The methods section will evolve from the findings of this literature review to further explore the research question: “*what is the role of psychological safety in staff engagement with PCs?*” by examining current staff engagement levels, collating the perceived barriers, and ascertaining if working patterns are implicated. It will also

explore the relationship between PS, manager behaviours, EI and engagement with PCs. It is hypothesised that PS will be positively related to engagement with PCs.

### **3. Methods**

#### **3.1 Introduction**

Following the literature review, this research will seek to address the research question of “*what is the role of PS in staff engagement with PCs?*” It is hypothesised that PS will be positively related to engagement with PCs.

The objectives focused on will be: -

- To analyse staff engagement with PCs through primary research collected utilising a questionnaire.
- To investigate the relationship between PS and staff engagement with PCs through primary research.
- To identify perceived barriers to engaging with PCs through primary data.

This chapter will account for the methodology, including the design, research paradigm, sample framework, research procedure and data analysis approach taken. It will also explore ethical considerations and examine the limitations of this study.

#### **3.2 Design**

Critical realism (CR) research philosophy was followed (Saunders *et al.*, 2023). CR maintains there is an objective world (Pabel, Pryce and Anderson, 2021) which is subjectively interpreted (Edwards, O’Mahoney and Vincent, 2014), based on social conditioning (Saunders *et al.*, 2023). Whilst CR has been criticised for overestimating the value of philosophy of science as opposed to empirical science (Zhang, 2023) and

for overlooking the causal nature of experiences (Andrew & Baker, 2020), arguably there is no superior (Zhang, 2023), or correct paradigm for research (Saunders *et al.*, 2023). CR offers a way to view the research rather than conduct it which enables creativity and exploration of the objective reality which is subjectively interpreted (Hammond & Wellington, 2021).

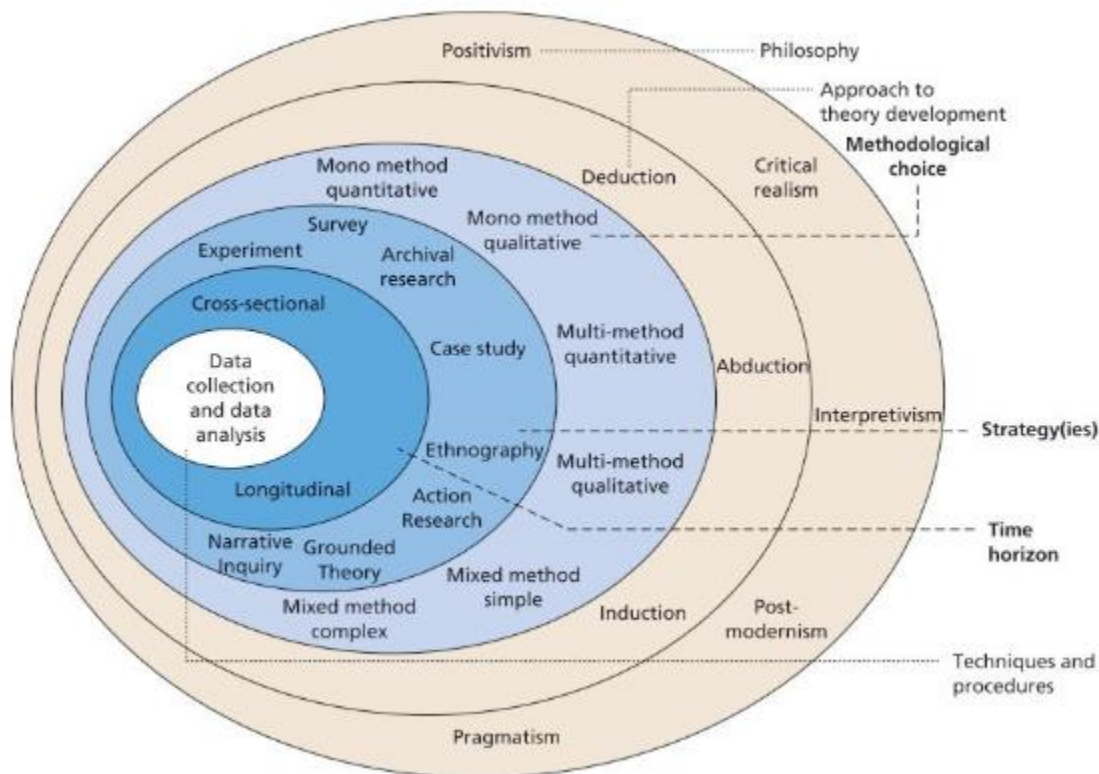


Figure 4: The research onion (Saunders *et al.*, 2023).

Consistent with the ontology and epistemology associated with CR (Fletcher, 2017), this research was both exploratory and descriptive in nature as it explored staff experience of barriers and enablers of engagement and the relationship between engagement with PCs and PS (Saunders *et al.*, 2023). To achieve this, deduction was applied to test a

hypothesis as well as induction to explore questions on a cross-sectional population (Saunders *et al.*, 2023). A mono-method questionnaire strategy was deployed to gain primary data which was predominantly quantitative and enabled deduction to be applied to explore a hypothesis (Hammond & Wellington, 2021). Some questions were qualitative, to gain deeper understanding of experience (Saunders *et al.*, 2023) and enable exploration of the inductive questions (Hammond & Wellington, 2021). Secondary data from within HDdUHB was explored in the literature review and will be referred to in the discussion alongside the findings from primary research.

Focus groups were considered as they would have allowed for a greater level of flexibility but were ruled out due to time constraints (Saunders *et al.*, 2023) and concern over social desirability (Coolican, 2016). The questionnaire survey method was chosen as it enabled exploration of structured questions which obtained standardised responses and enabled comparison and qualitative open questions for depth of understanding (Saunders *et al.*, 2023).

Predominantly quantitative primary data was captured to measure the dependent variable of engagement, and independent variables of EI, line manager behaviours and PS. Qualitative primary data was captured to ascertain the perceived barriers and enablers in line with CR (Pabel *et al.*, 2021; Saunders *et al.*, 2023) and enable a stronger understanding of engagement with PCs than the predominantly quantitative data within the field (Brown *et al.*, 2019). Caution was aired to ensure the qualitative

data was not valued less favourably than the quantitative data (Fàbregues *et al.*, 2021).

### 3.3 Sample

Consideration was given to the sample framework to ensure it was representative of the population (O’Gorman & MacIntosh, 2015). Acknowledging the lack of empirical research conducted on HR professionals within this area and the time constraints of this study, a cross section of HDdUHB’s workforce were targeted (Bickman & Rog, 2009). The target population for this sample were staff from the Workforce and Organisation Development Directorate (WFOD). Moreover, members of WFOD have regular access to computers and were able to access the questionnaire without support. A probability random sampling framework was used whereby all members of WFOD were invited to participate (O’Gorman & MacIntosh, 2015), this minimised potential selection bias (Coolican, 2016).

Participants were recruited via email (Appendix A) and were reminded of their voluntary ability to participate via Viva Engage and MS Teams Channels (Appendix B). This sample framework does not guarantee representativeness so a large proportion of participants from the target sample was required (Davies & Hughes, 2014). There are 250 staff in WFOD, for a statistically significant sample size, 152 participants were required (Qualtrics, 2023). Whilst the achieved response rate of 52% is not statistically significant (Qualtrics, 2023), it arguably meets student research requirements (Davies &

Hughes, 2014). Moreover, this is a higher response rate than the NHS Wales Survey compliance of 20% (NHS Wales, 2024).

### 3.4 Materials

#### *3.4.1 The research instrument*

When designing the questionnaire, the questions used were carefully considered to ensure logical sequence and avoid bias responses (Saunders *et al.*, 2023). To support construct validity, the researcher considered established instruments to measure constructs when available (Coolican, 2016).

#### *3.4.2 Engagement with performance conversations*

A reputable scale to measure the dependent variable of engagement with PCs was not found. It is acknowledged that researchers can create questions, but they may not be as valid as official scales due to the lack of robust testing (Saunders *et al.*, 2023).

Therefore, questions were designed to focus on cognitive engagement (Mayordomo *et al.*, 2022) by measuring perception (Cioca & Gifford, 2022), receptivity (Abraham, 2023; Schleicher & Baumann, 2019), comfortableness (Denny *et al.*, 2019; Fredette *et al.*, 2021; Ramani *et al.*, 2017) and frequency (Sleiman *et al.*, 2020), as the literature highlighted these as significant aspects of engagement with PCs. Wording was carefully considered to ensure questions could be understood clearly without risk of misinterpretation (Saunders *et al.*, 2023). Where relevant a 5-point Likert scale was utilised to measure engagement in line with the other Likert scales included in the survey (Saunders *et al.*, 2023).



Closed questions were utilised first to gauge engagement, followed by open questions to encourage more detailed feedback (NHS England, 2018) on opinions, previous experiences and perceived barriers and enablers of PCs (Brace, 2008). Whilst it is best practice for open questions to be at the end of a survey (Hammond & Wellington, 2021), they were placed at the end of the relevant section to enable flow and a logical sequence for the participant (Saunders *et al.*, 2023).

### *3.4.3 Emotional intelligence*

This research focused on trait-based EI utilising self-report measures (Bru-Luna *et al.*, 2021) as trait EI has been found to have temporal stability and can be measured through survey questions (Zadorozhny *et al.*, 2024). Questions from the Short Form Trait Emotional Intelligence Questionnaire (TEIQUE-SF) were used to measure EI (Cooper & Petrides, 2010). The TEIQUE-SF is a 30 item 7-point Likert scale which comprises of 2 items from each of the 15 facets on the original TEIQUE (Cooper & Petrides, 2010). Benefits of the TEIQUE-SF include it being a free and readily available version of its longer predecessor which has been widely used and has strong reliability and validity (O'Connor *et al.*, 2019). Whilst other scales have also been extensively tested (Bru-Luna *et al.*, 2021), the TEIQUE-SF benefits from being a shorter valid measure (O'Connor *et al.*, 2019). However, to keep the questionnaire a manageable length to encourage participation (Saunders *et al.*, 2023), 10 questions were selected to measure EI (Appendix C).

Scales can be adapted to explore social perception of manager EI (Elfenbein, Barsade, and Eisenkraft, 2015), which would be useful to explore the relationship between this leadership quality and engagement (Bru-Luna *et al.*, 2021). However, it was decided to omit these questions to avoid a lengthy questionnaire (Saunders *et al.*, 2023).

#### *3.4.4 Psychological safety*

The PS scale (Edmondson, 1999) was used to measure PS (Appendix D). It is a widely recognised measure (Wietrak & Gifford, 2024) which comprises of a 7-item Likert scale which asks respondents to rate statements from “very inaccurate” to “very accurate” (Edmondson, 1999). It has been widely found to be reliable across different samples of the population and to have strong content, criterion, and construct validity (Newman, Donohue, and Eva, 2017). It has also been found to have strong reliability and validity in virtual teams (Rødsjø, Sjølie, and Van Petegem, 2024). However, some researchers argue that measures of safety culture need to be modernised to focus on the conditions of trust in team members and trust in leadership (Cartland *et al.*, 2022). This could be contentious, and risks focusing on an aspect of PS rather than the construct itself (Wietrak & Gifford, 2024). Moreover, utilising author developed scales, rather than a reputable scale, risks compromising construct validity as it may diverge from measuring PS (Newman *et al.*, 2017).

#### *3.4.5. Line manager behaviours*

Whilst RC was not directly measured as it is concerned with how feedback is received in each feedback event (Scott, Rosoff and Sandler, 2024), questions were asked

concerning the perceived behaviours of the line manager that are conducive for meaningful PM.

#### *3.4.7. Demographics*

Demographic questions were asked to explore any differences between the experiences of different demographics (Brace, 2008). As demographic questions can be intrusive, they were at the end of the survey to reduce potential to deter responding and wording was checked to reduce intrusive nature (Saunders *et al.*, 2023). A prefer not to say (PNS) option was included for protected characteristics to encourage participation (Brace, 2008).

#### *3.4.8 Other materials*

Canva was utilised to create promotional materials (Appendix E). Data was analysed using Excel, SPSS and NVivo. All software used was accessible at no cost to the researcher through their university and work organisation which supported the financial viability of this research (Furseth & Everett, 2013).

### 3.5 Procedure

A web-based questionnaire was designed to gain qualitative and quantitative data from respondents. It was available in English and Welsh to support accessibility (NHS England, 2018), as they are the main languages of staff within WFOD. Web-based questionnaires are highly likely to reach the intended target population and can gain a large sample size compared to a paper copy (Saunders *et al.*, 2023). However, the

questionnaire should be short and mainly comprise of simple closed questions (Adams, Khan, and Raeside, 2007). A lengthy or complex questionnaire could result in failure to complete, or participants may complete incorrectly due to fatigue (Brace, 2008).

Microsoft Forms was utilised to administer the questionnaire as the sample were already familiar with this platform and highly literate with technology due to their roles within HDdUHB (Saunders *et al.*, 2023). Moreover, the researcher was aware they could not explore cause and effect but rather explore the relationship between variables (Coolican, 2016).

The questionnaire was pilot tested with a small group of voluntary colleagues, to quality assure it and strengthen reliability (Coolican, 2016). Voluntary colleagues were sourced from within the team. Consenting individuals were asked a short list of questions as feedback prompts (Appendix F) to aid researcher understanding of potential improvements (Bell & Waters, 2014). The pilot feedback was evaluated (Appendix G), and the questionnaire was edited where appropriate. Resulting in a finalised questionnaire (Appendix H). The target sample were then invited to participate in the research.

The researcher considered how to code the data prior to utilising software for analysis (Appendix I) (Pallant, 2020). To investigate the dependant variable (DV) of current engagement with PCs, quantitative data relating to engagement with PCs were scored and combined to provide total scores for individual engagement utilising MS Excel. Data surrounding line manager behaviours, PS and EI were also scored to provide a total

score for these independent variables. Negative items were reverse scored (Coolican, 2016).

SPSS software was utilised to undertake statistical tests on the quantitative data (Pallant, 2020). To explore the relationship between PS and engagement with PCs, the statistical method of Spearman's Rho was applied, assuming the data was ordinal (Coolican, 2016), as this data was obtained using Likert scales which expressed a scale of agreement with statements (Adams *et al.*, 2007).

NVivo software was utilised to carry out inductive thematic analysis of the qualitative data to draw out themes and patterns relating to feelings towards PCs and perceived barriers to PCs (Saunders *et al.*, 2023). NVivo enables a rigorous approach to qualitative data to understand the lived experiences (Allsop *et al.*, 2022). The researcher considered the data and was flexible about coding where appropriate (Saunders *et al.*, 2023; Fletcher, 2017).

### 3.6 Validity and reliability

Reliability and validity are often contrasted (Hammond & Wellington, 2021) but can be erroneously used interchangeably if their meaning is not purposefully considered (Bannigan & Watson, 2009). Reliability is concerned with the extent to which results can be reproduced and validity is the extent to which the results measure what they were intended to measure (Hammond & Wellington, 2021). Both should be considered when evaluating measures and research findings (Coolican, 2016).

External reliability can be assessed through test-retest (Bannigan & Watson, 2009).

Whilst some recognised measures were used within the survey which have proven reliability (O'Connor *et al.*, 2019; Newman *et al.*, 2017), the survey could be retested on the same population in future research to support stability (Coolican, 2016). Supporting reliability, a plan was created for data analysis (Appendix I) to ensure consistent coding of data (Adu & Miles, 2024) and mitigate for researcher bias (Saunders *et al.*, 2023). A web-based survey risks multiple completions and could compromise reliability (Adams *et al.*, 2007). Therefore, the 'submit another response button' was hidden. Participants were able to access the survey at any time to minimise the risk of participant error (Saunders *et al.*, 2023). Moreover, to mitigate recency bias the questions prompted participants to focus on the last year of their experience (Saunders *et al.*, 2023). Internal consistency was checked using Cronbach's alpha (Bannigan & Watson, 2009).

Construct and face validity was discussed with the pilot group who reported to understand clearly what the survey was measuring (Coolican, 2016). However, given that participants self-reported against the constructs measured by this study, it is possible that this is not objective and could result in misjudgements (Mayordomo *et al.*, 2022) or social desirability bias (Coolican, 2016). Whilst effort was made to minimise the risk of social desirability bias by carefully wording questions (Saunders *et al.*, 2023), future research may wish to collect more objective data (Mayordomo *et al.*, 2022).

Considering construct validity, there is argument that negatively framed questions should be avoided to ensure clarity (NHS England, 2018). However, the scales used to measure EI and PS are regarded to have good levels of internal consistency (O'Connor *et al.*, 2019; Newman *et al.*, 2017), thus are considered reliable indicators (Coolican, 2016). When using scale questions, the researcher attempted to ensure balance and include equal positive and negative response attitudes and enable a neutral response to avoid forcing false positive or negative attitudes (Brace, 2008). Whilst both the TEIQUE-SF (Cooper & Petrides, 2010) and PS Scale (Edmondson, 1999) use a 7-point Likert scale, feedback from the pilot suggested this was not compatible with mobiles and needed users to scroll across to see the full scale on desktops. The selection between a 7- and 5-point scale is controversial in the literature (Russo & Tomei, 2020). Having an odd number scale enables people to show indifference and supports content validity (Adams *et al.*, 2007) and a 5-point scale is considered less confusing than a 7 (Russo & Tomei, 2020). Therefore, 5-point Likert scales were used throughout the survey.

### 3.7 Ethical considerations

Ethics is fundamental (Adams *et al.*, 2007), because it ensures credibility, integrity and safeguards the researcher, participants and organisations involved in the research (Saunders *et al.*, 2023). Application of a framework can ensure effective ethical analysis (Stutchbury & Fox, 2009). The Seedhouse (1998) framework (Figure 5), was developed for healthcare but is widely used in the social sciences and was applied to guide systematic thinking (Stutchbury & Fox, 2009). However, the framework cannot

overcome any missing knowledge areas but rather, seeks to enable best practice with the information available (Johnston & Stevens, 2021).

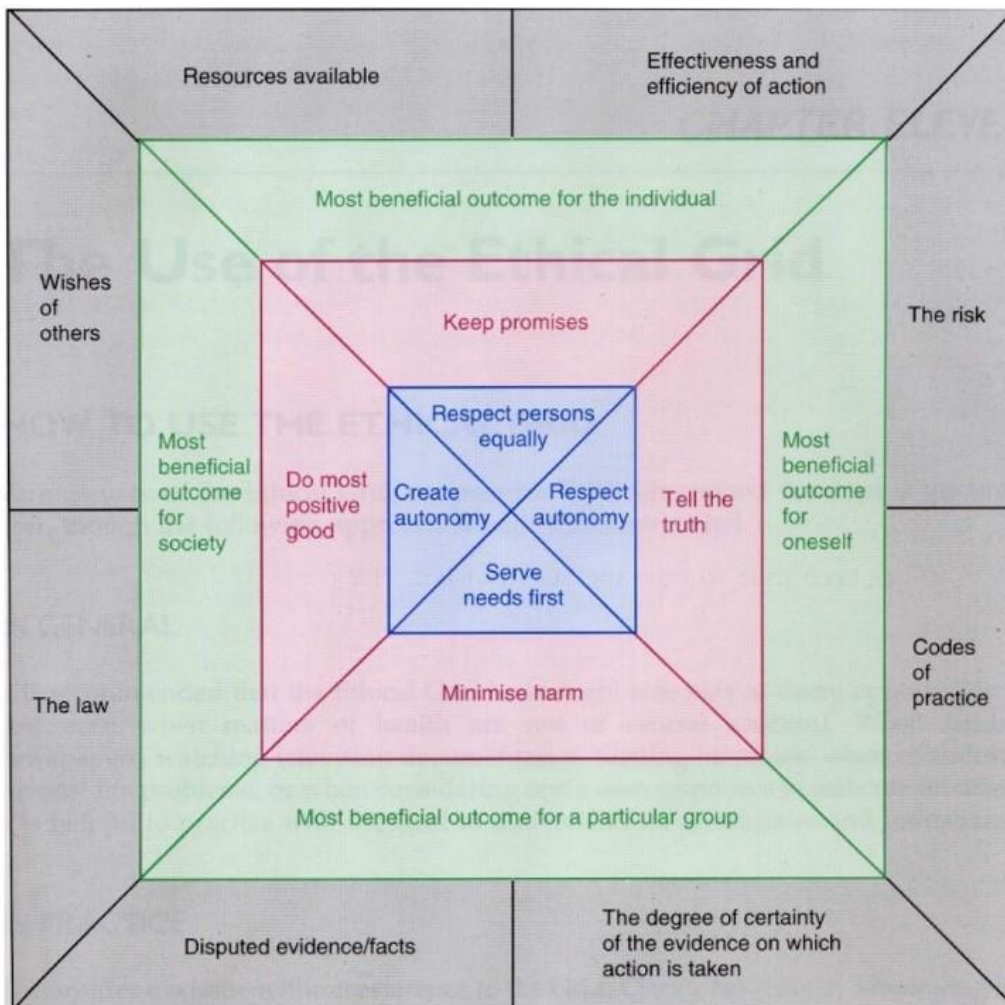


Figure 5: The ethical grid (Seedhouse, 1998).

### 3.7.1 Internal layer

Respect and autonomy are at the core of ethical research (Johnston & Stevens, 2021).

Informed consent was sought from all participants (Saunders *et al.*, 2023), and their



right to voluntarily participate or withdraw was communicated (Adams *et al.*, 2007) (Appendix J).

### *3.7.2 Deontological layer*

The researcher made efforts to maintain an open mind and avoid confirmation bias (Coolican, 2016) which could have resulted in unethical behaviours (Adams *et al.*, 2007) or conflict of interest (Adu & Miles, 2024). To ensure transparency, the recruiting materials and preamble within the survey were honest and made the purpose of the research clear to the prospective participants (Adams *et al.*, 2007).

### *3.7.3 Consequential layer*

Reflecting on previous experiences with PM or cultural elements surrounding PM may have caused emotional distress to a participant (Saunders *et al.*, 2023) so signposting to support was included within the debrief (Appendix K). Moreover, the researcher may be exposed to distressing material when reading the responses. To mitigate this, the researcher was aware of their ability to access support from the Staff Psychological Wellbeing Service.

### *3.7.4 External considerations*

Exploring the external considerations (Seedhouse, 1998), the researcher upheld the CIPD code of conduct and ethics (CIPD, 2023) in line with the constrictions of their profession and upheld the guidelines of UWTSD (2022) as a student of their institution. Ethical approval was gained from UWTSD prior to conducting any research (Appendix

L). Consideration was also given to legal regulation (Seedhouse, 1998), notably, the *Data Protection Act 2018*. As personal identifiable information was provided by participants when completing the questionnaire, it was imperative to ensure confidentiality and anonymity were upheld (Coolican, 2016) and measures were taken to ensure that individuals were not identified within this dissertation (Saunders *et al.*, 2023).

Detailed ethical considerations can be found in the ethics form submitted to the University (Appendix M).

### 3.8 Limitations

Whilst effort has been made to negate for issues, it is acknowledged there are limitations to any research (Adu & Miles, 2024). Given the research is not taking place in a controlled laboratory, there could be other confounding variables which are related to the dependent variable of engagement with PCs (Coolican, 2016; London *et al.*, 2023; Cioca & Gifford, 2022). To mitigate this risk, the individual's EI and manager behaviours were also explored but it is acknowledged that other factors could be contributing.

Caution needs to be aired with the survey data as self-reporting does not necessarily measure behaviour (Sik, Cummins and Job, 2024) and can lead to social bias (Coolican, 2016). To mitigate this risk, it was communicated that responses were anonymous and honest participation was encouraged (Coolican, 2016). Arguably, triangulation with secondary data from within HDdUHB would have further enhanced the

validity, credibility, and authenticity of the findings (Saunders *et al.*, 2023) by adding depth (Denzin and Lincoln, 2018) but did not fit the design (Saunders *et al.*, 2023) or dissertation constraints.

Finally, the delimitation concerning the population scope of HR staff within a healthcare organisation must be considered (Adu & Miles, 2024). As this research was conducted on a cross-section, caution must be aired when applying the findings to the wider workforce within HDdUHB given the respondents to this survey are a small proportion of the overall workforce (HDdUHB, 2024a). Moreover, as other HR professionals at other organisations may have differing experiences it would be apt for future research to be conducted with other areas of this population to gain generalisability (Saunders *et al.*, 2023).

### 3.9 Summary

This chapter critically evaluated the research methods and discussed the procedure, materials and sample used. Quantitative data and supporting qualitative data were collected using a survey. Whilst CR has been criticised (Zhang, 2023; Andrew & Baker, 2020), the paradigm enables exploration of the objective reality which is subjectively interpreted (Hammond & Wellington, 2021). The sample framework was considered to ensure it was representative of the population (O’Gorman & MacIntosh, 2015). A probability random sampling framework was applied (O’Gorman & MacIntosh, 2015), to minimise selection bias (Coolican, 2016), focusing on a cross-section of the workforce (Bickman & Rog, 2009). Whilst it was not statistically significant (Qualtrics, 2023), a

higher response rate was obtained than the NHS Wales (2024) Survey, enabling valuable insights. Validity, reliability and ethics were carefully considered to ensure the integrity of the research (Saunders *et al.*, 2023).

The next chapter will analyse the data. Statistical tests will be performed in SPSS on the quantitative data to ascertain differences between groups and identify possible relationships. Qualitative data will be analysed using NVivo to conduct thematic analysis and identify perceived enablers and barriers to engagement with PCs.

## **4. Results**

### **4.1 Introduction**

This chapter will analyse the primary research which explored staff experience with PCs and sought to address the research question: “*what is the role of PS in staff engagement with PCs?*” The data analysis will seek to address the objectives: -

- To analyse staff engagement with PCs through primary research collected utilising a questionnaire.
- To investigate the relationship between PS and staff engagement with PCs through primary research.
- To identify perceived barriers to engaging with PCs through primary data.

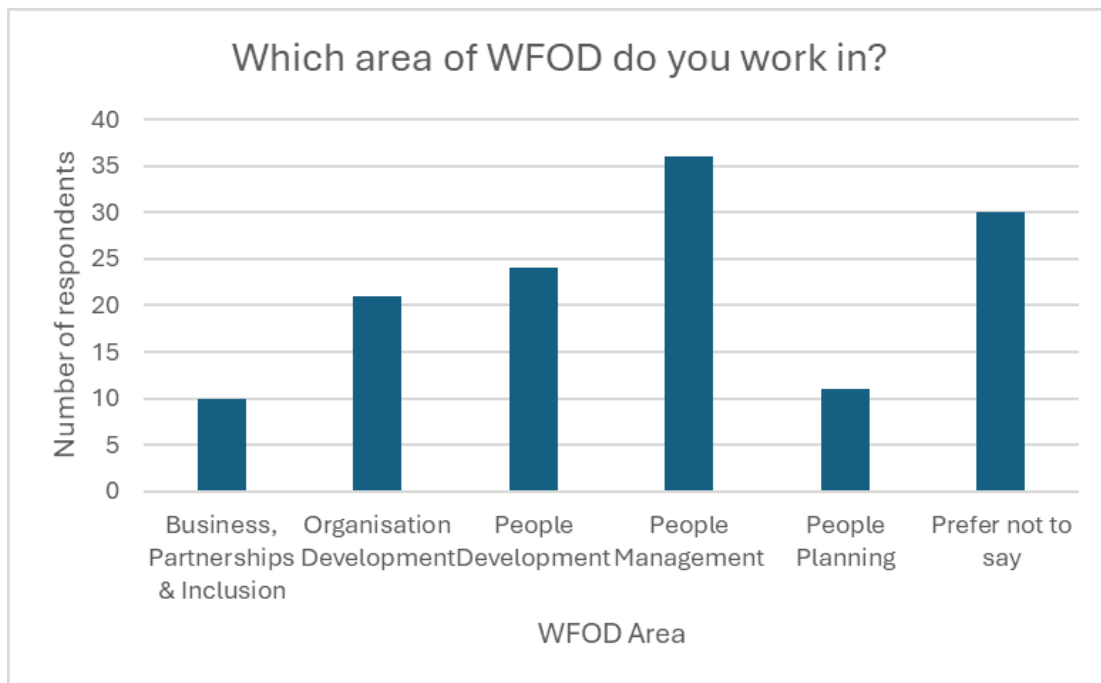
Then, the results will be discussed and compared to the secondary data and existing literature in the Discussion Chapter.

### **4.2 Descriptive statistics**

132 participants were recruited. Gender, disability and ethnicity have a similar distribution to the organisational data (HDdUHB, 2025a). Age and religion differed slightly, possibly skewed by the prefer not to say (PNS) option and differences in data categorisation (HDdUHB, 2025a).

*Table 1: Demographics of respondents*

<b>Demographic</b>	<b>Response</b>	<b>Frequency</b>	<b>Percentage</b>
<b>Gender</b>	Female	101	76.5%
	Male	17	12.9%
	Prefer not to say	14	10.6%
<b>Age Range</b>	Under 24	1	0.8%
	25-34	21	15.9%
	35-44	34	25.8%
	45-54	33	25%
	55-64	25	18.9%
	65+	1	0.8%
	Prefer not to say	17	12.9%
<b>Disability</b>	Yes	9	6.8%
	No	105	79.5%
	Prefer not to say	18	13.6%
<b>Ethnicity</b>	Asian	5	3.8%
	White	113	85.6%
	Prefer not to say	14	10.6%
<b>Religion</b>	Christian	60	45.5%
	Hindu	2	1.5%
	No religion	44	33.3%
	Other religion (not the predominant 5 globally)	1	0.8%
	Prefer not to say	25	18.9%



*Figure 6: Area of WFOD respondents work in.*

All areas were represented in the sample, with People Management being the most reported pillar. Comparing this to internal data, it reflects the distribution with People Management making the largest pillar. However, People Planning is the smallest (HDdUHB, 2025a), this difference could be due to 22% not disclosing. 80.3% of the respondents work full-time and 19.7% work part-time.

#### 4.3 Pre-treatment of data

All responders had a unique ID (N= 132). Data was cleansed and blank responses to optional qualitative questions were coded as “no answer” (Adu & Miles, 2024). Each answer was scored and grouped into the variables they were set to measure using the codebook (Pallant, 2020) (Appendix I).

This resulted in a transformed data set which included numerical coding for nominal data and provided ordinal scores for PADR quality, engagement with PCs, PS, manager behaviour and EI. The dataset was then checked for errors and no score fell outside the possible score ranges (Pallant, 2020).

#### 4.4 Pre-analysis checks

Pre-analysis checks were carried out utilising SPSS (Appendix M). Internal consistency checks for reliability were conducted using Cronbach's alpha on the scales used to measure each construct (Saunders *et al.*, 2023). According to Newman *et al.* (2017) the PS scale (Edmondson, 1999) has a good reliability. Supporting this, in the current study the scale scored 0.86 Cronbach's alpha (Pallant, 2020).

Cronbach's alpha for the items used to measure engagement with PCs was scored 0.92 and Cronbach's alpha for the items used to measure manager behaviours was 0.97. Both scores are  $>0.75$ , all items on both scales respectively were shown to be positively correlated, and the corrected item-total correlations were all  $>0.4$ . Therefore, this suggests internal consistency of both scales (Pallant, 2020).

According to O'Connor *et al.* (2019), the TEIQUE-SF has a good reliability, in the current study the 10 selected questions from this scale scored 0.78 Cronbach's alpha which is  $>0.75$ . However, some correlations were low and negative.



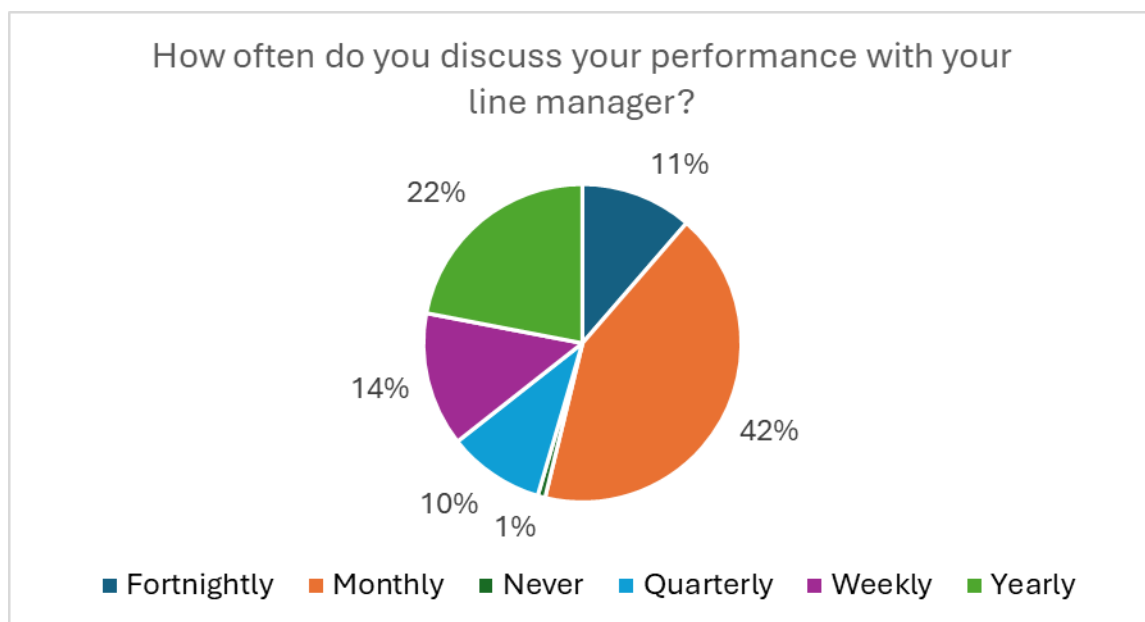
*Table 2: Descriptive statistics of the variables (N=132)*

<b>Variable</b>	<b>Median</b>	<b>Interquartile range</b>	<b>Range</b>	<b>Mean</b>	<b>Standard Deviation</b>	<b>Skewness</b>	<b>Kurtosis</b>
<b>Engagement with Performance Conversations (PCs)</b>	52	12	29	51.31	7.3	-0.71	-0.23
<b>PADR Quality</b>	17	5	12	16.76	3.13	-0.88	0.09
<b>Manager Behaviours</b>	56.5	12	38	52.86	8.74	-1.17	0.67
<b>Psychological Safety (PS)</b>	28	8	24	27.92	5.32	-0.55	-0.22
<b>Emotional Intelligence (EI)</b>	39	7	29	38.86	5.01	-0.49	0.42

Data was checked for normality, and it did not meet the assumptions as the skewness and kurtosis values are not 0 (Pallant, 2020). Histograms (Appendix N) showed that the data is skewed except for EI score. Therefore, non-parametric tests will be used as the data does not meet normality checks for parametric analysis (Pallant, 2020).

#### 4.5 What is staff engagement with performance conversations currently and are there any differences between groups of the WFOD population?

The average frequency of PCs was reportedly monthly (42%) followed by annually (22%), with 1 individual reporting to have never had a PC, despite having worked within HDdUHB for 3-4 years (R130).



*Figure 7: Percentage of frequency of engagement with PCs.*

Crosstabulations show there are differences between groups (Appendix O). Those with less than a years' service reported more frequent PCs. Chi squares test for independence could not be conducted due to breach of the assumptions (Pallant, 2020).

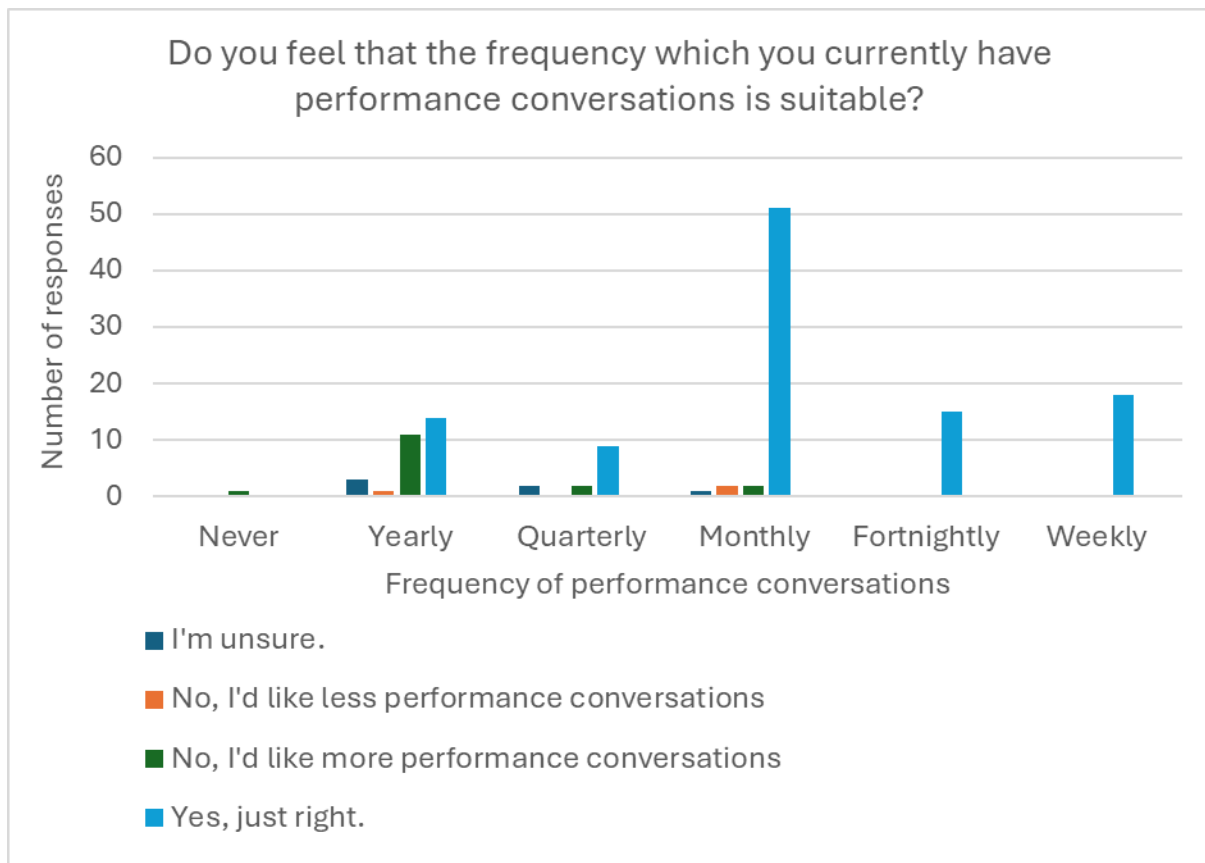
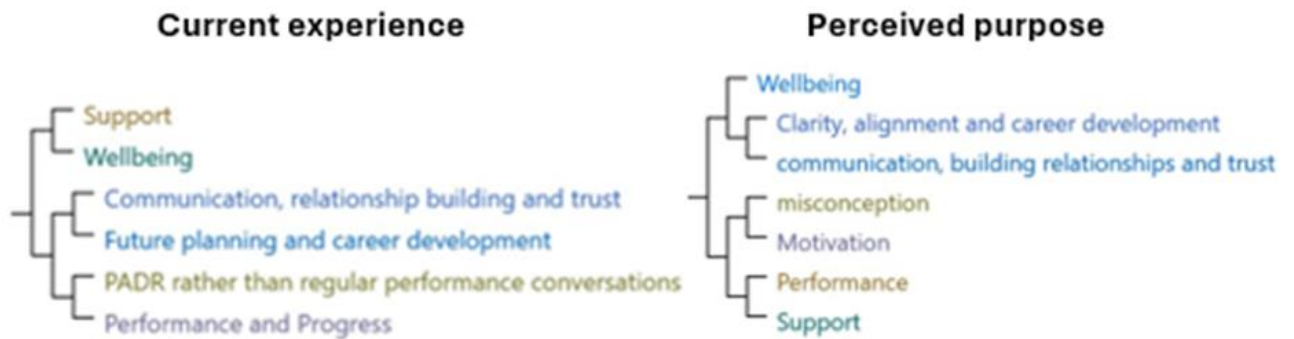


Figure 8: Preference of frequency of engagement with PCs.

Given almost ¼ of respondents reported annual engagement with PCs, it is important to explore their understanding of what PCs entail. Thematic analysis of responses to what they currently discuss during PCs and what they believe the purpose of PCs to be (Appendix P), revealed differences between what respondents believed the purpose was compared to the lived experience of some individuals, thus suggesting the Directorate could improve its PM culture.



*Figure 9: Experience of PCs versus perceived purpose.*

The exploration of code similarities suggests a key difference between current experiences and perceived purpose. When PCs are purposeful there is richer conversation with the key themes being more interlinked, whereas the interlinkage is reduced in the current experiences.



Their contributions were recognised and they highlighted a sense of feeling supported and encouraged by their manager.

*“I feel encouraged to improve and learn. I feel thankful for the acknowledgement of my efforts.” (R114)*

There was also a sense of a desire to learn and a growth mindset which enables exploration and innovation based on the feedback.

*“[...] I know there are areas that I can improve on and [I’m] keen to learn.” (R55)*

*“Feel supported and at times will take a different approach from sharing my workload based on feedback.” (R88)*

Analysis shows there are some negative feelings experienced after PCs including anxiety, frustration and dissatisfaction. Exploring the responses, these negative emotions can arise where there is a lack of rich discussion of the individual’s performance.

*“[...] discussions are rarely about actual performance but rather more focused on progress, obstacles, dependencies, other competing priorities.” (R36)*

The lack of clarity surrounding their performance can lead to disengagement and the questioning of the purpose of performance management.

*“[...] uncertainty on how I am performing, what I do well, where I could improve so possibly disengaged and cynical around the purpose of 121s or supervision.”*

*(R15)*

Infrequent PCs can consequently lead to anxiety when they are not regularly experienced.

*“When it comes to discussing personal performance, as it is not something that we do often, it is a nerve-wracking process.” (R63)*

Some responses were neutral in emotion. Some demonstrated mixed-emotions including satisfaction-overwhelm and clarity–overwhelm.

Given the different emotions experienced after engaging with PCs, it is important to consider if there are any differences between groups of respondents and their engagement with PCs. Mann Whitney U tests found no significant difference in engagement scores between managers and those without line manager responsibility nor between groups of contractual hours (Appendix Q).

A Kruskal-Wallis test (Appendix R) found a significant difference between engagement scores under the different gender categories. Median engagement scores were 52 (female), 57 (male) and 42 (PNS),  $X^2(2, n = 132) = 14.27, p < .01$ .

Kruskal-Wallis H tests found a significant difference between engagement and age groups,  $X^2 (2, n = 132) = 21.17, p < .01$ . Median scores for age groups were: under 24 (57), 25-34 (56), 35 – 44 (56.5), 45-54 (52), 55-64 (49), 65+ (48) and PNS (41). The mean ranks for the groups indicate the highest engagement scores were from younger respondents and the lowest were from those in the older age groups and the PNS group.

A significant difference was found in engagement scores between PNS responses and those with no disability  $X^2 (2, n = 87) = 26.2, p < .01$ . Kruskal-Wallis tests found no significant difference in engagement scores between sexuality, ethnicity, religion or pay band.

Exploring the differences between areas of WFOD, a Kruskal-Wallis test found no significant difference between engagement with PCs across the pillars of WFOD.  $X^2 (2, n = 132) = 8.04, p > 0.05$ . Moreover, no significant difference was found between the area of WFOD and their scores for any of the independent variables (IVs).

To ascertain if there were any differences in engagement with PCs across time spent in the physical office, a Kruskal-Wallis test was run but no significant difference was found.  $X^2 (2, n = 132) = 4.56, p > 0.05$ . Moreover, no significant difference was found between time spent in the physical office and their scores for any of the IVs. Nor between an individual's engagement and the location of the PC.



The average frequency of PCs was monthly, but it ranged from weekly to never. There were differences between what was reportedly discussed during PCs and their perceived importance. Notably, richer conversations which delved deeper into the key themes were perceived as the purpose whilst typical discussion themes appeared more surface level with pockets of exemplary experiences. Regularity, clarity, support and a desire to learn were associated with positive emotions post PC, whereas a lack of rich discussion of performance, lack of clarity, and scarcity of the conversations themselves lead to negative emotions post conversation. There were misconceptions including irrelevance and tick-box nature. Some reported experiences included having annual appraisals, rather than a combined approach of regular PCs with annual appraisal. Differences were found for engagement with PCs between gender, age and disability status. No significant differences were found for engagement score and sexuality, ethnicity, religion, pay band, location of PC, time spent in the physical office or area of WFOD.

#### 4.6 What is the relationship between psychological safety and staff engagement with performance conversations?

It was predicted there would be a positive relationship between PS and engagement with PCs. The null hypothesis applied in this research is that there will not be a statistically significant relationship between PS and engagement with PCs.

Spearman's Rho was carried out to examine the relationship between the DV of engagement with PCs and the IV of PS (Appendix S). Spearman's Rho found

engagement and PS were significantly positively related,  $R(132) = 0.57$ ;  $p < .01$ . The coefficient of determination suggests the variables share 32% of their variance (Pallant, 2020). Indicating, higher levels of PS are associated with higher levels of engagement with PCs. Therefore, the null hypothesis can be rejected.

As the data did not meet the assumptions of a multiple regression the IVs were tested individually (Coolican, 2016).

*Table 3: Results of the Spearman's Rho for the relationship between each independent variable and engagement with PCs.*

<b>Independent variable</b>	<b>Spearman's rho (R)</b>	<b>Significance</b>	<b>Coefficient of determination (<math>R^2</math>)</b>
<b>Psychological Safety (PS)</b>	0.57	<0.01	0.32
<b>Emotional Intelligence (EI)</b>	0.33	<0.01	0.11
<b>Manager Behaviour</b>	0.84	<0.01	0.71
<b>PADR Quality</b>	0.55	<0.01	0.30

These results show all the IVs are significantly positively related to the DV. Manager behaviours are most related to engagement with PCs and EI is the least related. Specifically, these results have found a weak relationship between EI and engagement,

a moderate relationship between engagement and the IVs of PS and PADR quality and a strong relationship between engagement and manager behaviours (Pallant, 2020).

Analysis in Power BI (Appendix T), found the key influencers to be asking opinion before making decisions, a PADR which strengthens the relationship between employee and manager and the belief no one would deliberately undermine your efforts.

All the IVs are significantly positively related to the DV and the null hypothesis was rejected. Manager behaviours are most related to engagement with PCs and EI is the least related. To positively drive engagement with PCs through these IVs HDdUHB could seek to encourage managers to ask and listen to opinions before making decisions that affect individuals, utilise the PADR to strengthen the relationship and encourage PS through discouraging teams to deliberately undermine efforts.

#### 4.7 What are the barriers and enablers of engagement with performance conversations?

To identify perceived barriers to engaging with PCs, qualitative data was analysed using NVivo. Word clouds were created to visualise the suggested barriers and enablers with irrelevant words being added to the stop list to prevent them forming part of the word cloud. These visualisations illustrate the negative language associations with barriers and positive language with enablers.



*Figure 11: word clouds depicting words used to describe the barriers and enablers of engaging with PCs.*

To explore these further, responses were coded inductively and then these codes were grouped into overarching themes through inductive thematic analysis to produce 8 key themes as barriers and enablers of engagement with PCs.

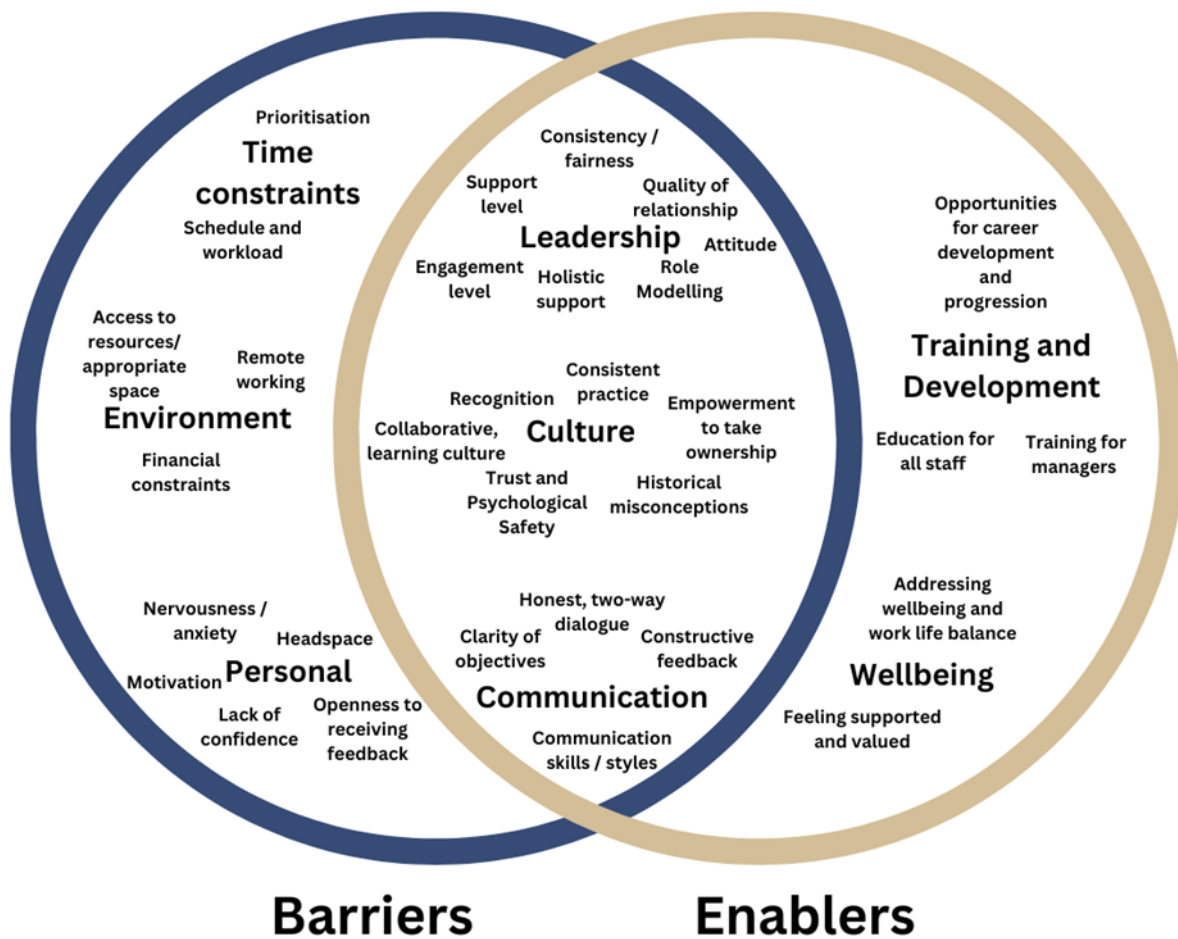


Figure 12: key themes and sub-themes of barriers and enablers

#### 4.7.1 Time constraints

Workload was a barrier which led to cancelled meetings and an inability to schedule them.

*“[...] so busy we have to postpone.” (R88)*

*“Capacity to find time for meetings.” (R110)*

Line managing a larger volume of staff was also raised.

*“Ensure leaders have the time to undertake the conversations and that the line manager structure allows for this.” (R62)*

Consequently, time constraints can impact the depth of the conversation and therefore be a barrier to effective PCs.

*“Workload can prevent in depth conversations sometimes with the draw to return back to the workstation [...]” (R78)*

However, some respondents reported that due to the value they believe PCs to have they prioritise them, and equally, their managers also show support and commitment to protecting the time which enables engagement with PCs. Conversely, they cancel PCs when they are not prioritised.

*“Sometimes I’ve not enough time to have them due to heavy workload, however I find them really valuable so I make time [...] my boss is really busy however he makes time for me” (R26)*

*“Time and how I prioritise me in the scheme of things.” (R45)*

To summarise, time constraints including workload, busy diaries and lack of prioritisation were highlighted as barriers to engaging with PCs but through prioritisation staff can enable engagement.

#### *4.7.2 Environment*

Linked to the time constraints, the environment was also highlighted as a barrier during thematic analysis with elements including remote working, access to resources and the financial position of HDdUHB being raised. One respondent raised the financial position of HDdUHB as a barrier and whilst they did not give context this links to other themes including training and development. Remote working was raised as a potential barrier due to the lack of opportunity for organic, impromptu conversations.

*“Remote working removes the opportunity for informal/ad hoc conversations.”*

*(R29)*

With the rise in agile working, MS Teams is being used to conduct PCs. Some staff prefer face-to-face meetings to discuss their performance rather than meeting via MS Teams.

*“Personally I prefer face to face discussions.” (R125)*

However, face-to-face meetings can be difficult due to the geographical distance between some managers and their team members and concerns for confidentiality and

privacy. This can lead to cancelling the meeting. One staff member suggested walking meetings to overcome this barrier.

“The only barrier is the paper-thin walls [...] my manager is always mindful of confidentiality and we have even gone for a walking meeting.” (R76)

Thus, whilst remote working, digital meetings and geographical distance can be viewed as barriers they offer opportunity for innovative approaches to meeting locations which can enable engagement.

#### *4.7.3 Personal*

Respondents also wrote about a range of personal contributors that can be barriers to engaging with PCs which included confidence, headspace, motivation, openness to feedback and personality types.

Self-confidence is an enabler, and low confidence can be a barrier that can lead to worrying about being criticised or feeling like a burden.

*“[...] worry that I’m going to get criticised, or that I’m not performing well enough, or that I’ll be given more work and will find it unmanageable.” (120)*

*“Feeling a burden if I continuously initiate the need to converse.” (R116)*



Links can be seen here to the relationship with manager and leaderships styles with one respondent highlighting personalities and relationships as a key barrier or enabler.

*“Depends upon relationship with manager / personality of people concerned.”*

*(R37)*

Individuals can feel unmotivated to engage due to their misconception that PCs are for progression.

*“Not really motivated as probably unlikely to progress from my current post due to my age.” (R42)*

Summarising, the relationship with the line manager, self-confidence level, headspace, motivation, openness to feedback and personality types can all be factors involved with the likelihood of someone engaging with a PC. Additionally, misconceptions surrounding the purpose of PCs can be a barrier.

#### *4.7.4 Culture*

Some staff displayed misconceptions as to what PCs were. Including that they were not age appropriate, misunderstanding their purpose and lacking clarity around what they entailed.

*“[...] not necessarily what they should be used for. A lot of this is historical system wide misunderstanding of performance management and regular conversation.”*

*(R15)*

Another cultural element which can enable engagement with PCs is PS. Respondents highlighted the current culture as a barrier. People can feel a sense of fear, blame or not being listened to. A key enabler of PS and subsequent engagement was highlighted to be trust with low trust being highlighted as a barrier.

*“Everyone being willing and open to do so, people trusting who they are telling but everyone having a role to play.” (R132)*

The individual leading the conversation and it being a two-way discussion was also highlighted as an enabler, with some individuals referring to experiences where this was not the case as being a barrier to engagement.

*“Both parties being open to asking for and receiving feedback.” (76)*

*“Sometimes it is their way they have it in their head and there is no room for discussion [...]” (R113)*

A lack of consistency, fairness and the occurrence of favoritism can be a barrier to engagement.

*“Lack of consistency across the team, some of us are pulled up on performance and others are left to their own devices.” (R126)*

Therefore, culture was widely highlighted as a barrier and enabler with staff highlighting a need for empowerment to take ownership of performance, recognition, a collaborative learning culture, PS and consistent leadership practices across the Directorate that foster trust, fairness and equal opportunity.

#### *4.7.5 Leadership*

As previously highlighted, the quality of the relationship is considered important coupled with approachableness.

*“This could be an issue with an unapproachable manager.” (R128)*

Managers that are supportive and ensure that they role model seeing the value of these discussions were highlighted as enabling engagement with PCs.

*“My manager will prioritise these discussions.” (R34)*

Role modelling feedback seeking behaviours was also mentioned by a respondent.

*“Needs to start with senior management welcoming feedback from their subordinates about their own performance and how it impacts the team.” (R118)*

To conclude, leadership is both a barrier and enabler with respondents highlighting relationship quality, attitude, support and engagement level of the leaders as well as fairness, role modelling and holistic support.

#### 4.7.6 Wellbeing

Leaders that offered holistic support to team members were considered enablers.

*“Having managers who are caring, not only about the work, but the wellbeing of their staff.” (R67)*

A key enabler linked to this was ensuring contribution was recognised and that the staff member felt valued.

*“Regular ongoing feedback, recognise and celebrate achievements.” (R56)*

To summarise, respondents mentioned providing recognition, discussing and supporting wellbeing as enablers for engagement with PCs.

#### 4.7.7 Communication

Elements of communication were the most referred to barriers and enablers amongst respondents. The frequency of the conversations was seen as a potential enabler. The content of these conversations was also highlighted to be an enabler with constructive feedback, honest, two-way dialogue and clarity of objectives being highlighted.

Respondents also spoke about a lack of ownership when they are not measured against anything as a barrier.

*“Clarity of personal, team and organisational objectives so that it’s clear how my performance is contributing to the organisation as a whole.” (R11)*

Thus, suggesting communication is a key enabler.

#### *4.7.8 Training and Development*

When writing about the enablers some respondents highlighted training and development as enablers.

*“Leaders having the correct training and coaching to build their confidence.”*

*(R108)*

*“Management training in recognising the importance of regular discussions and in terms of how to have and conduct sometimes challenging conversations. Managers typically don’t like having difficult conversations so tend to avoid or conduct them poorly.” (R36)*

Other respondents suggested ways managers could be developed including toolkits, simulation experiences, induction, guidance and coaching. Educating staff on the benefits of performance management was also raised.

*“Shared learning and practice [...] clarifying that there is a difference between regular meetings which are only work task orientation and the importance of talking about performance not just in PADR’s.” (R39)*

*“It’s about all staff at all levels understanding the benefits of engagement and support.” (R88)*

Some staff reported not being able to attend training as being a barrier to their engagement.

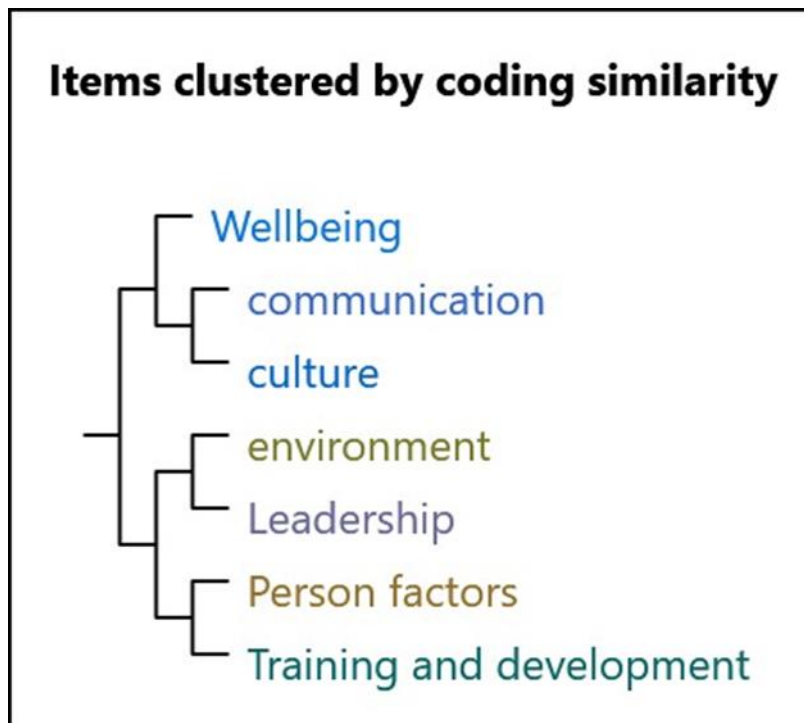
*“More encouragement towards enrolling onto courses.” (R59)*

*“Attending the right training courses for the role that enable you to feel confident [...]” (R24)*

Summarising, respondents highlighted that training and development of managers which coaches them as leaders can instill best practice and enable them to carry out their role with confidence. Educating all staff to overcome historical misconceptions surrounding performance management was also highlighted as an enabler. Moreover, some staff felt that to enable engagement with PCs, access should be available to appropriate training opportunities.

#### 4.7.9 Interlinked themes

To understand the relationship between the themes a diagram was generated in NVivo to explore the links between the codes.



*Figure 13: Cluster of coding similarity between barriers and enablers of PCs.*

The barriers and enablers of engagement with PCs are interlinked with wellbeing being spoken about with communication and culture, environment with leadership and person factors with training and development.

#### *4.7.10 Summary*

In summary, negative language such as lack, busy, difficult and issue were used when explaining the barriers, whilst positive language including open, positive, understanding and clear were used when discussing the enablers. Thematic analysis highlighted key themes to include wellbeing, communication, culture, environment, leadership, person factors and training and development. There was interlinkage between these themes.

#### 4.8 Conclusion

To conclude, the barriers and enablers were interlinked. Key themes included wellbeing, communication, culture, environment, leadership, person factors and training and development. This suggest that to enable engagement with PCs HDdUHB needs to encourage leaders to foster leadership styles, cultures and environments which provide the optimum conditions for all staff to feel empowered, safe and able to engage with PCs.

Exploring the second research question, on average, staff engage with PCs monthly. However, this ranged from weekly to never. There were misconceptions reported, including irrelevance at some career stages and tick-box nature. Some reported experiences lacked a combined approach of regular PCs with annual appraisal. Regularity, clarity, support and a desire to learn were associated with positive emotions post PC, whereas a lack of rich discussion of performance, lack of clarity, and scarcity of the conversations themselves lead to negative emotions post conversation.



Differences were found for engagement with PCs between gender groups, age groups and disability status.

PS, EI, manager behaviour and PADR quality were all shown to have a statistically significant relationship with engagement with PCs. Thus, the null hypothesis was rejected. The relationship between PS and engagement with performance scores was significantly positive. The two variables shared 32% of their variance and the data suggests that higher levels of PS are associated with higher levels of engagement with PCs. To positively drive engagement with PCs through these IVs, HDdUHB could seek to encourage managers to listen to team members and engage them in decision making, utilise the PADR to strengthen the relationship and encourage PS through ensuring team members feel that no one would deliberately undermine their efforts.

Accordingly, these findings will be analysed in conjunction with the literature and will then be utilised to propose recommendations to strengthen engagement with PCs to enhance performance within HDdUHB.

## **5. Discussion, conclusion and recommendations**

### **5.1 Introduction**

The findings will be discussed and compared to existing literature and secondary data. Each objective will be concluded, and recommendations will be made to strengthen engagement with PCs to enhance performance, develop staff (Gifford, 2024a; Webber, 2024) and support retention (HDdUHB, 2018) in line with strategic plans (HDdUHB, 2024b) and the performance management (PM) policy (HDdUHB, 2022).

The research aimed to address: *“what is the role of PS in staff engagement with PCs?”* The first objective, *“to define, research and critically review PCs and the concept of PS utilising existing literature and secondary data, from internal and external sources,”* was fulfilled during the introduction and literature review and will be applied to the findings within this chapter.

It was hypothesised that PS would be related to engagement with PCs. Primary research addressed objectives two, three and four: -

- To analyse staff engagement with PCs through primary research collected utilising a questionnaire.
- To investigate the relationship between PS and staff engagement with PCs through primary research.
- To identify perceived barriers to engaging with PCs through primary data.

These will be concluded during this discussion and objective five will be completed through recommendations made at the end of this chapter.

## 5.2 O2: Current engagement

Refreshingly, the frequency of PCs suggests, HR staff within HDdUHB are experiencing more regular PCs than those reported by Sayers *et al.* (2018). This provides insightful data on the unrecorded, informal conversations for HDdUHB (2025b). Considering the literature commonly upholds PCs to be regular and informal (Gifford, 2024a), the reported frequency range in this study suggests not all staff are currently experiencing PCs (Sleiman *et al.*, 2020). However, it can be argued that quality and content are more significant (Cioca & Gifford, 2022; Gifford *et al.*, 2017).

Understanding of PCs were mixed and there were differences between lived experience and perceived purpose which may be a factor in consequential engagement with PCs. A key difference between current experiences and perceived purpose is that when PCs are purposeful there is richer conversation with the key themes being more interlinked, whereas the interlinkage is reduced in the current experiences.

Some staff had misconceptions about PM, including that it is not relevant across career stages, and it is a tick-box exercise which unfortunately echoes internal survey data (HDdUHB, 2024d). Some reported only experiencing annual appraisals rather than a combination of appraisal with regular PCs. The literature suggests that this could

negatively impact staff motivation and consequent engagement with PM (Wigert & Harter, 2017; Murphy, 2020).

Building on the findings of Lee (2021), during this study participants reported predominantly positive emotions post PC, and regularity, managerial support, recognition and clear goals contributed to positive emotional association. Whilst negative emotions can arise when conversations are infrequent or there is a lack of rich discussion or clarity surrounding the individual's performance. Alternatively, Vich and Kim (2016) theorise that RC could reduce harsh emotions and low self-esteem surrounding PCs.

Differences were found in engagement with PCs across age groups with younger age groups having higher engagement with PCs and older age groups and prefer not to say (PNS) having lower engagement levels. This could be related to previous experiences (Wigert & Harter, 2017). There was also a difference in engagement with PCs between those that PNS and those that did not have a disability. Which may be due to those with a disability choosing to use the PNS option (Brace, 2008).

Addressing the gap in the research through exploration of the effectiveness of PCs in the virtual environment (Brown *et al.*, 2019), contrary to Raišienė *et al.* (2020), no difference was found for engagement with PCs across time spent in the physical office or the location of the PC. However, this may be due to PM practices having been in

place for several years (Mertens & Schollaert, 2023) and is promising for HDdUHB as it continues to enable hybrid practices amongst WFOD staff (HDdUHB, 2024a).

WFOD staff experience more regular PCs than those reported by Sayers *et al.* (2018).

However, there are inconsistencies with the frequency, perceived purpose and content of PCs which resulted in positive and negative emotional associations with PCs.

Notably, differences were found in engagement across age group and disability status which may be related to previous experiences (Wigert & Harter, 2017). Responding to the research gap surrounding PM and the virtual environment (Brown *et al.*, 2019), no difference was found for engagement with PCs across time spent in the physical office or the location of the PCs which contrasts with the literature (Raišienė *et al.*, 2020). This could be due to the established PM practices which may be more resilient to the adaptation to hybrid working (Mertens & Schollaert, 2023).

### 5.3 O3: PS and engagement

PS was found to be significantly positively related to engagement with PCs. Indicating that higher PS is associated with higher levels of engagement with PCs. Therefore, the null hypothesis was rejected. This supports the wider literature which shows PS to be interrelated with the factors involved in effective PCs including positive relationships, quality feedback (London *et al.*, 2023) and feedback seeking behaviours (Desveaux *et al.*, 2023).

These findings could be explained by Kahneman (2012) and the SCARF model (Rock, 2008), as low PS, low engagement with PCs and negative emotional association could be explained as avoidance of threat (Rock, 2008). Whereas, when PS was higher, engagement with PCs was higher and individuals associated PCs with more positive emotions, potentially associated with reward (Rock, 2008). The negative emotions reported could be linked to feedback which was perceived as accusatorial or judgemental (Thornton, 2024; Erickson *et al.*, 2022), thus threatening (Rock, 2008).

Supporting the wider literature, this research suggests line manager behaviours have a strong positive relationship with engagement with PCs. Some respondents appreciated feedback that enabled them to identify and understand how to improve, which highlights the avoidance of providing feedback as counter intuitive (Brown *et al.*, 2016; McCutcheon & Duchemin, 2020). Coupling these findings with RC theory (Scott, 2019), leaders should apply RC and ensure fair and specific feedback on work (Mharapara & Staniland, 2020) through compassionate leadership (Scott, 2024; West & Wallbank, 2025) and avoid ruinous empathy with no challenge (Scott, 2019) as challenge is necessary to avoid exploitation (Clark, 2020).

Concurring with the literature (Goleman, 2020; Alam & Singh, 2021), this study found a positive relationship between EI and engagement with PCs. However, the relationship between EI and engagement with PCs was weaker than the other variables which contrasts with other research which suggests it can mediate PS and subsequent learning behaviours that emerge after PCs occur (Alam and Singh, 2021).

Whilst the interaction between these variables was not fully statistically explored, the findings suggested certain elements of them were key influencers. Therefore, to positively drive engagement with PCs through these variables, HDdUHB could seek to encourage managers to ask and listen to opinions before making decisions that affect individuals, utilise the PADR to strengthen the relationship and encourage PS through discouraging teams to deliberately act in a way that undermines efforts.

These findings concur with the literature and uphold PS to be significantly positively related to engagement with PCs. Deeper investigation of this relationship suggests manager behaviours and EI also contribute. RC offers explanation for these findings as individuals thrive on feedback which is specific and supportive (Scott, 2019). Application of the SCARF model (Rock, 2008), further illustrates how when PS is higher, engagement with PCs is higher and individuals associate PCs with more positive emotions, potentially associated with reward rather than threat (Rock, 2008). Notably, HDdUHB could encourage managers to apply these findings to positively drive engagement with PCs and support the WFOD Strategy (Gostling, 2020).

#### 5.4 O4: Barriers and enablers

Exploring the barriers and enablers can add further insight to the relationship between PS and engagement with PCs. Thematic analysis highlighted time constraints, wellbeing, communication, culture, environment, leadership, person factors and training

and development as key themes. Respondents utilised negative language when explaining the barriers, whilst positive language was associated with the enablers.

There was interlinkage between these factors, which corroborates the argument of LaDonna & Watling (2018) that whilst motivation and leader-appraisee relationship are factors in engagement, there are other factors involved. Notably, echoing the NHS staff survey (West & Wallbank, 2025), asking opinions before making decisions was a key influencer. Other key influencers were a PADR which strengthens the relationship between employee and manager and the belief that no one in the team would deliberately undermine efforts. Thus, supporting the notion that strong PS (Edmondson, 2019b) and actively listening to staff can drive transformation and exemplary patient care (West & Wallbank, 2025).

#### *5.4.1 Wellbeing*

Feedback can enable staff to feel listened to, acknowledged and supported (Hallam *et al.*, 2023). Some respondents mentioned discussing and supporting wellbeing as an enabler for engagement with PCs. In line with the literature (Ihensekien & Joel, 2023), a key enabler linked to this was recognition.

#### *5.4.2 Communication*

Linked to the factor of wellbeing, the quality (Cioca & Gifford, 2022) and holistic nature (Gifford *et al.*, 2017) of PCs are upheld in the literature as important factors.

Complimenting this, the content of these conversations was considered an enabler with



constructive feedback, honest, two-way dialogue and clarity of objectives being highlighted. This supports Duitsman *et al.* (2019) as they argued two-way conversations enable the individual to express their perspective and facilitate reflection. Concurring with Gifford (2024a), the frequency of conversations was seen as a potential enabler. Consistent with the literature (Blackman *et al.*, 2022), respondents also spoke about a lack of measurement of performance as a barrier to engagement. This study did not find any support for the notion that linguistic differences can pose barriers to effective communication and feedback between the appraiser and appraisee (Thornton, 2024) but this may be due to the demographics of the population studied.

#### 5.4.3 Culture

In line with the literature (Denny *et al.*, 2019; Johnson *et al.*, 2020), culture was widely highlighted as a barrier and enabler with staff highlighting a need for empowerment to take ownership of performance, recognition, collaborative learning culture, PS and a consistent practice across the Directorate.

As highlighted in organisational feedback (HDdUHB, 2024d), some staff displayed misconceptions surrounding PCs. This is notable as research suggests they are crucial for continuous improvement and the delivery of high-quality patient care (Thornton, 2024). Moreover, when PCs are misunderstood and viewed as a “tick-box” in this study this links to bureaucracy and can negate from the learning opportunity (La Donna & Watling, 2018). Rather, PCs should be free from hierarchical demands, to gain positive feedback reception rather than fear (Hirsch, 2020), which could result in feedback

filtering (La Donna & Watling, 2018) or avoidance (Denny *et al.*, 2019). Thus, reducing the power gap by being an ally to the individual can promote PS (Johnson *et al.*, 2020).

Respondents highlighted that the current culture can be a barrier as people can feel a sense of fear, blame or not being listened to. Complimenting this finding, the literature suggests previous experiences can make people wary of making themselves vulnerable to potentially have another damaging feedback experience (Denny *et al.*, 2019). This supports the wider literature which shows PS to be a factor in feedback seeking behaviour (Desveaux *et al.*, 2023). Coupling these findings with Ramani *et al.* (2017), feedback seeking should be encouraged and role modelled (Desveaux *et al.*, 2023), and normalising self-disclosure of personal limitations (Denny *et al.*, 2019) could enhance PCs and PS (Newman *et al.*, 2017) as staff feel safe to be vulnerable (La Donna & Watling, 2018). However, culture change is slow and complex (Schein & Schein, 2017).

#### *5.4.4 Environment*

Coexistent with the cultural aspects are the system factors which this research has highlighted as barriers to engaging with PCs which include workload, busy diaries and lack of prioritisation. Geographical distance, remote working and a lack of suitable office space were also salient. Interestingly, the use of MS Teams was an issue for some respondents who prefer a face-to-face interaction. This phenomenon is echoed in the literature with practical constraints being a prominent factor which can limit managers'

abilities to engage in frequent PCs (Johnson *et al.*, 2023) and there may be less informal opportunities for feedback in the digital working environment (Mertens & Schollaert, 2023; Raišienė *et al.*, 2020).

#### *5.4.5 Time constraints*

Concurring with McCutcheon and Duchemin (2020), time constraints were highlighted to impact the depth of conversation and consequentially be a barrier not only to engaging with PCs but also to their effectiveness. This research expanded on that notion to find that line managing a large volume of staff was a barrier. However, when the individual and their manager valued PCs they were prioritised. Thus, enabling engagement.

#### *5.4.6 Leadership*

Leadership was mentioned as a barrier and enabler with respondents noting relationship quality, attitude, support and engagement level of the leaders as well as fairness, role modelling and holistic support. Schleicher and Baumann (2019) offer explanation for this finding as the manager can influence employee perceptions, attitudes, cooperation, and perceived fairness (Schleicher & Baumann, 2019). Echoing the findings, Denny *et al.* (2019) note the relationship is an important enabler for engagement with feedback. Harmonising with the widely accepted notion that micromanagement and control are not favourable among employees (Lee, 2021), the individual leading the conversation and it being a two-way discussion was a prominent enabler. This can also allow for holistic tailoring of PCs (Marchington *et al.*, 2021; Ihensekien & Joel, 2023).

In line with the literature (Lee, 2021), links were found between relationship with manager and leadership styles with one respondent highlighting personalities and relationships as a key barrier or enabler. The findings of *Fredette et al. (2021)* that manager agreeableness, demeanour, mood, and credibility also contribute to the likelihood of the employee engaging with feedback, offer further insights into our findings. Therefore, whilst leadership skills are not a prerequisite, HDdUHB should consider the ramifications of managers not possessing these skills (NHS Wales, 2025).

#### *5.4.7 Personal*

Echoing the literature (London *et al.*, 2023; Cioca & Gifford, 2022), respondents raised a range of personal contributors which went beyond attachment styles (London *et al.*, 2023), to include confidence, headspace, motivation, openness to feedback and personality types. Individuals can feel unmotivated to engage due to the misconception that PCs are for progression thus supporting the notion that motivation, views (Wigert & Harter, 2017) and engagement (Murphy, 2020) are interlinked.

#### *5.4.8 Training and Development*

Training and development were a key theme which encompassed access to training opportunities, appropriate training and coaching for effective leadership and ensuring education for all staff to overcome misconceptions about PCs. These results are

consistent with prior reviews which suggest that buy-in from all staff is required for success (O’Kane *et al.*, 2023).

#### *5.4.9 Summary*

These findings have identified eight interlinked key themes as the barriers and enablers of engagement with PCs which offer insight to HDdUHB and managers on how to foster and enable engagement with PCs.

#### 5.5 Limitations

Limitations arose including the statistical factor that the data was non-parametric, meaning the quality of the statistical tests used was not as robust as parametric tests (Pallant, 2020). Future research could seek to obtain data from a larger population which may enable a more diverse response and increase the likelihood of gaining parametric data for a more robust analysis (Pallant, 2020). Moreover, this research focused on staff from the Workforce and Organisational Development Directorate whose experiences may not be the same as other Directorates within HDdUHB. Future research could explore the experiences of staff from other professions within HDdUHB to gain more generalisable findings which represent the experiences of staff across the organisation (Coolican, 2016). The scope of this research did not explore how staff act upon feedback which could be explored as the literature suggests output after feedback is an indicator of engagement (Molloy *et al.*, 2020), and not all feedback is acted upon (Fredette *et al.*, 2021) which could be due to feedback filtering (La Donna & Watling, 2018) or possibly a more complex interaction of factors which could be explored.

Moreover, whilst the questions used to measure engagement with PCs were found to have strong internal consistency, they have not undergone rigorous testing. Given there is no widely respected instrument to measure this multifaceted concept (Young, 2024), future research could seek to further develop a reputable scale.

Notwithstanding these limitations, this research provides valuable insights into the experiences of WFOD staff and their current engagement with PCs. To our knowledge, it is the first paper to explore the relationship between PS (Edmondson, 1999; Ajjawi *et al.*, 2022), EI (Alam & Singh, 2021; Oluwafemi & Ametepe, 2023) and engagement with PCs. Crucially, all the independent variables were found to be related to engagement with PCs and several barriers and enablers of engagement with PCs were identified.

### 5.6 Implications

These findings have noteworthy implications for HDdUHB. Specifically, they highlight a relationship between all the independent variables and engagement with PCs and suggest certain elements are key influencers. Therefore, to positively drive engagement with PCs, HDdUHB could seek to encourage managers to ask and listen to opinions before making decisions that affect individuals, utilise the PADR to strengthen the relationship and encourage PS through discouraging teams to deliberately undermine efforts.

HR professionals can glean that whilst they cannot control engagement with PCs (O’Kane *et al.*, 2023), they can empower the appraiser and appraisee (Abraham, 2023)

to overcome some of the misconceptions and weak leadership feeding disengagement found in this study through education, training and coaching (Gavin, 2019; Denny *et al.*, 2019).

Future researchers could consider these findings and build on them by further investigating the interaction between PS, manager behaviours, EI and engagement with PCs.

### 5.7 Conclusion

This research suggests the current lived experiences of WFOD staff is inconsistent. Notably, differences were found in engagement across age group and disability status. Secondly, PS is positively related to engagement with PCs. Finally, eight interlinked key themes were highlighted as barriers to engagement with PCs.

Taking the findings from these research objectives into account, they suggest that to enable engagement with PCs, HDdUHB needs to encourage leaders to foster leadership styles, cultures and environments which provide the optimum conditions for staff to feel empowered, safe and able to engage with PCs.

## 5.8 Recommendations

Fulfilling the final objective, the following recommendations have been formulated. Acknowledging the financial position (Betteley, 2024), recommendation one should be prioritised. However, these recommendations should all be undertaken if financially viable as they would support HDdUHB to motivate (Beatson, 2023) and retain staff (HEIW, 2023) which could consequentially save money on future recruitment, and support performance and patient care (Thornton, 2024).

*Table 4: Recommendations*

What	Why	Who	Where	When
<b>1: To develop engaging online educational materials for all staff about giving and receiving meaningful feedback.</b>				
Equip staff with skills to deliver and engage with meaningful feedback through microlearning, which is accessible anytime (Alias & Razak, 2025), inclusive of shift patterns and	To enable HDdUHB to overcome historical misconceptions and support leaders to foster compassionate, supportive styles which enable trust, fairness and equal opportunities. It would	HR, staff	Online resources.	01/09/25  This should be reviewed six months



geographical location (HDdUHB, 2024a).	support staff to understand how to have effective PCs (O’Kane, 2023).			after rollout (Kotter, 2025)
<b>2: To evaluate current PS within WFOD to enable future provision of support to areas with low levels of PS.</b>				
Hold culture conversations with staff from WFOD which aim to listen to staff experience and understand aspects of best practice and areas for improvement related to PS.	Given PS was found to be related to engagement with PCs, coupled with the wider literature's stance on the value PS holds (Edmondson, 2019b).	HR, WFOD staff	Face to face and via MS Teams.	23/02/26

### 3: To carry out this research with a different area of the workforce.

Conduct research with the X Directorate as their PADR compliance is currently the lowest in HDdUHB (2024a) so this exploration could develop insight and enable HDdUHB to support compliance.	This would deepen understanding of barriers and enablers to engaging with PM for X staff, broaden generalisability across HDdUHB (Coolican, 2016) and support the reliability of this questionnaire (Saunders <i>et al.</i> , 2023).	HR, relevant Directorate	Digital survey	01/04/2026.
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