



The Health Services Partnership Agreement

INCORPORATING

Protocol on Handling Significant Change through Partnership
&
Statement of Common Interests

May 2006

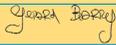
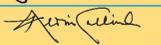
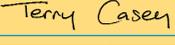
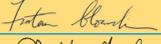
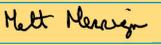
Working Together for a Better Health Service

HEALTH SERVICES PARTNERSHIP AGREEMENT

incorporating Protocol on Handling Significant Change through Partnership
& Statement of Common Interests

These documents were developed by Health Service Management and Trade Unions, working under the aegis of the Health Services National Partnership Forum.

Signed: Forum members

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May 2006

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HEALTH SERVICES PARTNERSHIP AGREEMENT

respect
&
support

MISSION STATEMENT

Working Together for a Better Health Service enables a new active relationship in managing change characterised by employee participation and consultation, the development of joint objectives, co-operation and trust and the delivery of patient-focused quality Health Services.

VISION STATEMENT

The Health Services National Partnership Forum will assist health agencies in the deepening of workplace partnership to achieve the highest quality service, care and working arrangements, by continuous improvement through management, staff and trade union collaboration.

VALUES

This set of values expresses how, individually and collectively, we treat clients, consumers and each other through:

- ▶ Efficiency & Effectiveness
- ▶ Caring & Commitment
- ▶ Striving For Excellence
- ▶ Respect & Support for each other
- ▶ Integrity & Openness
- ▶ Loyalty to Partnership Goals and Values
- ▶ Developing Trust
- ▶ Communication & Listening
- ▶ Leadership
- ▶ Focusing on Interests
- ▶ Seeking Win-Win solutions
- ▶ Accountability & Responsibility

INTRODUCTION

The Health Services Partnership Agreement sets out a framework, agreed by management and trade unions in the health services, within which a set of partnership principles, processes and structures, linked to shared interests and goals, are to be applied.

Initiated in 1999 under the Partnership 2000 Agreement, the Health Services Partnership Agreement will, unless otherwise agreed, operate in the context of the prevailing national agreement and the National Health Strategy - Quality and Fairness.

The Health Services comprise all acute, primary, community and continuing services and supports provided by the Health Service Executive to patients and other service users, in accordance with their obligations under the Health Acts, together with those services provided on their behalf by voluntary and other non-statutory agencies.

It is recognised that:

- ▶ Within the health sector, both formal and informal arrangements have existed for many years which provided for partnership approaches to the resolution of difficulties;
- ▶ The modern health service operates in a very complex and demanding environment where a partnership approach can provide a positive framework for the management of change;
- ▶ Experience to date has shown that enhanced partnership, between management, staff and trade unions, with a strong client focus, has led to services being continuously developed and improved.

PARTNERSHIP ISSUES

Effective engagement of stakeholders through a partnership process leads to the development of a shared vision of organisational objectives and goals and the acknowledgement of shared interests and actions that contribute to the ongoing modernisation of the health services.

The partnership approach facilitates adaptability, change and innovation in methods of service delivery. It improves the quality of working life and minimises or eliminates the negative aspects of confrontation in the management of conflict and the resolution of difficulties. It maintains a core objective of improving the quality of service for those who receive treatment and care from health service providers.

The key principles underpinning the partnership approach are:

- ▶ Quality in the delivery of health and social services;
- ▶ Added value through innovation and involvement;
- ▶ Enhancing the quality of the work environment and workplace relationships;
- ▶ Inclusiveness, Communication, Consultation, Participation and Collaboration;
- ▶ Opportunities for staff and their representatives to be involved in and contribute to meeting organisational challenges, the development of strategies and service planning;
- ▶ Skills development, training, and personal development planning to improve job satisfaction, career prospects and services in line with the *'high trust, high skill, high quality workplace'* principle;
- ▶ Co-operation with change, including new forms of work organisation and/or service delivery including the effective use of new technology;
- ▶ Equal opportunities including reconciliation of family and work responsibilities;
- ▶ Workforce composition including possible evaluation of working arrangements or re-profiling work;
- ▶ Effective management of people at all levels of performance;
- ▶ Re-organisation of conventional structures or approaches to service delivery.

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WHAT 'PARTNERSHIP' MEANS IN THE HEALTH SERVICE CONTEXT

Partnership is set in the context of the prevailing national social partnership agreement and the provisions of the National Health Strategy - Quality and Fairness. It is given expression in the HSNPF Strategy and Service Plan.

Partnership is a way of working, not just a once-off initiative. It requires commitment and leadership by all those involved. These agreements and strategies set out general parameters requiring both a concerted and co-ordinated drive to improve responsiveness and flexibility in the delivery of health services and a dynamic response to staff aspirations for more fulfilling work and improved career paths. When effectively undertaken, the outcome is seen in a changed organisational climate conducive to better job satisfaction, increased motivation, increased commitment and the provision of treatment, services and care that further benefit those for whom the service exists.

Through successive national agreements, all health service staff, their representatives and managers, have agreed to participate in the modernisation agenda, whether through local service improvements or performance verification reports and site visits. The emphasis is on involvement and resolution of difficulties at local level, where possible.

The partnership approach is characterised by the introduction of structures, processes and behaviours that aid and verify implementation of partnership service/action plans. It requires the development between management, staff and trade unions of processes to progress and complete partnership plans and service improvements.

The partnership approach does not replace or substitute national or local industrial relations systems and procedures. However, as an effective partnership approach evolves and develops, it progressively reduces the traditional adversarial approach to industrial relations issues. Partnership creates and supports opportunities for alternative dispute resolution processes. It is expected that further development of the partnership process will further improve the industrial relations climate. It is also accepted that the full remit of clinical responsibility, managerial accountability and statutory obligations cannot be dealt with through the partnership process.

It may be necessary that implementation of some partnership service/action plan issues have to be referred through industrial relations procedures to conclusion or, alternatively, that some issues are channelled from industrial relations procedures to working groups or other processes under partnership arrangements. Such referrals will arise at national, regional or local levels, as appropriate to the issue involved.

HEALTH SERVICES NATIONAL PARTNERSHIP FORUM (HSNPF)

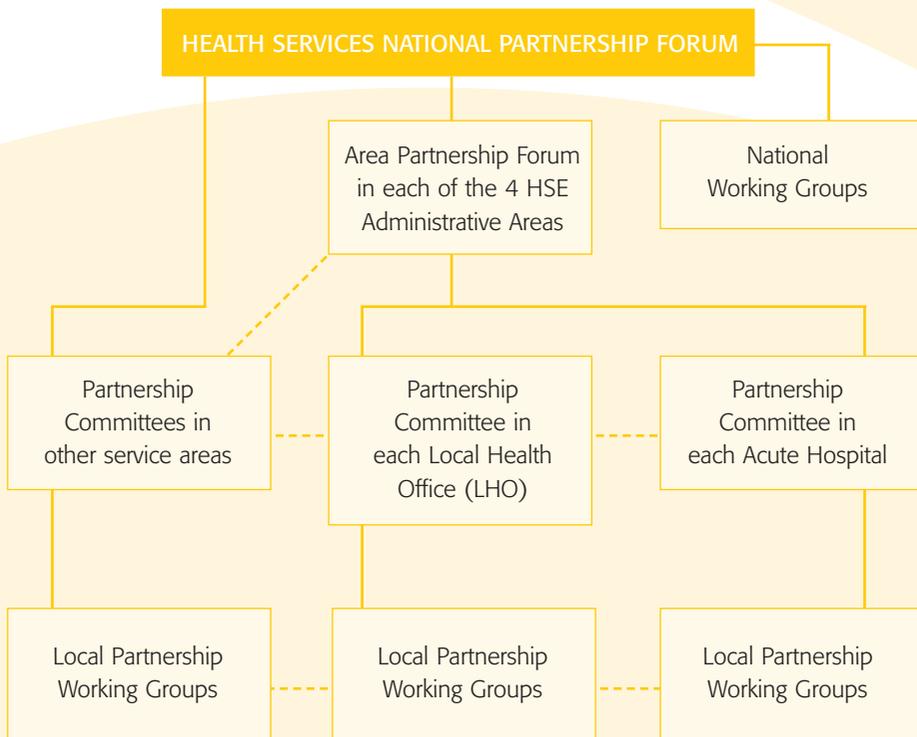
Membership of the HSNPF comprises an equal number of management and trade union representatives.

The role and purpose of the HSNPF is as follows:

- ▶ To provide leadership to the health service partnership process;
- ▶ To champion partnership within health services management and within the trade unions;
- ▶ To ensure that the interests and objectives of the HSNPF's constituent groups are discussed at the partnership table;
- ▶ To provide a national level forum within which health service management and trade unions can agree the broad parameters within which partnership is advanced at national, regional and local level;
- ▶ To support the partnership process within agencies and, if appropriate, support initiatives with service-wide application;
- ▶ To resource the partnership process as appropriate, including the provision of suitable training and facilities;
- ▶ To assist the development of best practice communications in the health services;
- ▶ To communicate the partnership message;
- ▶ To promote and develop measurement and evaluation of partnership with a view to learning and sharing information and to develop protocols based on this learning, e.g. a protocol on best partnership practice in the implementation of change;
- ▶ To continue to monitor relevant developments at national and international level in areas within and outside the health services and to develop strategic links;
- ▶ To formally verify progress in the health service context in relation to implementation of the modernisation programme as set out in all national agreements since Partnership 2000.

OUTLINE STRUCTURE TO SUPPORT AND DEVELOP PARTNERSHIP ACTIVITY IN THE HEALTH SERVICES

This chart outlines the partnership structures that are designed to support and develop partnership activity in the reformed health services and indicates some of the networking links across the system.



Dotted lines denote networking links -----

AREA PARTNERSHIP FORUM

An Area Partnership Forum will be set up in each of the four HSE Administrative Areas – HSE Dublin Mid-Leinster, HSE Dublin North-East, HSE South and HSE West. Membership will include senior HSE managers in the area, full-time trade union officials and representatives from Partnership Committees.

Each Area Partnership Forum will meet three-four times a year.

The role and purpose of an Area Partnership Forum is as follows:

- ▶ To enable and support active, integrated partnership at all levels in the area.
- ▶ To ensure productive networking among the partnership committees in the LHOs, Acute Hospitals, Voluntary Sector and other services.

PARTNERSHIP COMMITTEES

Partnership Committees will continue to exist and to be established at local level e.g.:

- ▶ in Local Health Offices
- ▶ in Acute Hospitals
- ▶ in Voluntary Intellectual Disability agencies
- ▶ in various sections of the HSE such as Shared Services, Corporate Services etc.

MEMBERSHIP OF PARTNERSHIP COMMITTEES

When Partnership Committees are being established, the most senior manager within that part of the organisation will be invited to nominate management representatives to the Partnership Committees and local Trade Union officials will be invited to nominate staff representatives.

Where Local Partnership Working Groups (LPWG) are formed they should comprise management and staff representatives and membership should be agreed by the Partnership Committee with due regard to balance and inclusiveness.

Partnership Committees should comprise a balanced representation of management and staff. Experience to date has shown that when the Partnership Committee reflects the mix of stakeholder groups within the organisation it ensures balance, improves real communication, ensures that decisions reflect consensus and leads to trust between the

Partnership Committees and the wider organisation. This means that sometimes Partnership Committees need to be larger (or smaller) than the recommended membership of twelve.

The involvement of recognised trade union representatives on the Partnership Committee is a visible sign of the commitment of trade unions to Partnership and also brings a level of authority to the Committee among staff and trade unions. It can also ensure a link to the trade union structures and can ensure that Partnership is consistently an item on the agenda of trade union meetings.

The involvement of the most senior manager as a member of the Partnership Committee is a visible sign of the commitment of management to Partnership. It brings a level of authority to the Committee and sends a clear signal to managers at all levels that “partnership is the way we do our business”. The presence of the most senior manager can also ensure a link to the senior management team ensuring good communication between Management and Partnership and making sure that Partnership is consistently an item on the agenda of the management team meeting.

All Partnership Committees should have joint chairs. The management representatives to the committee select the management Joint Chair and the trade union representatives select the trade union Joint Chair.

Partnership Committees need to establish links with all stakeholders in the organisation and these can include:

- ▶ All staff within the organisation or unit/department within which the committee is established;
- ▶ The senior management team;
- ▶ Trade union committees and activists;
- ▶ Full-time trade union officials;
- ▶ Patients, clients or service users where service improvements or changes are envisaged.

A facility exists that enables full-time trade union officials, specialists and other management personnel to attend meetings of Partnership Committees, as deemed appropriate.

ROLE AND PURPOSE OF PARTNERSHIP COMMITTEES

In general terms, the role and purpose of a Partnership Committee is

- ▶ To be a forum which provides an overall focus for the partnership process
- ▶ To facilitate the development and implementation of Workplace Partnership
- ▶ To facilitate long-term cultural change within their organisations.

Specifically, Partnership Committees will:

- ▶ Draw up partnership service/action plans based on the provisions of National Agreements, Organisational/Corporate Strategies, Service Plans and the Accreditation Process.
- ▶ Promote and enable partnership to become an integral part of overall service planning and thus support the mainstreaming of partnership.
- ▶ Ensure that all units and staff are, where possible, consulted and involved in these processes.
- ▶ Encourage the involvement of service users.
- ▶ Monitor and verify progress in relation to the achievement of partnership service/action plan objectives.
- ▶ Make progress reports to the HSNPF through existing quarterly reporting mechanisms. The information gathered from these reports will also help to build a comprehensive database that will enable learning from past experiences.
- ▶ Play an important role in the performance verification process under national agreements, e.g. Sustaining Progress. Site visits by the Performance Verification Group should be organised through partnership structures and it is strongly advised that the partnership committee be consulted prior to finalisation of local performance verification reports.
- ▶ Use sub-groups to progress issues and to draw in and include more staff from outside the Partnership Committee. The use and delegation of responsibilities, with clear terms of reference, to sub-groups and/or individuals between meetings can lead to more effective use of time at Partnership Committee meetings.

Partnership Committees, both at organisational and local level, will find that agreeing joint objectives and/or mission statements and terms of reference before they tackle issues will help prevent many disagreements and difficulties arising further into their work.

Where appropriate, inter-agency networks should be established, consisting of, for example, Joint Chairs of Partnership Committees, with a view to sharing information, steering partnership and encouraging integration of services.

To date Partnership Committees have been involved in areas such as:

- ▶ Information Sharing - Management informing the Partnership Committee of impending changes, issues etc;
- ▶ Consultation - the Partnership Committee being consulted by Managers responsible for an issue or a change to seek their input on how best to move forward in an inclusive manner;
- ▶ Involvement in and management of major organisational change – a protocol has been developed by HSNPF to assist with this role, which can be seen on pages 17–27 of this document;
- ▶ Ensuring that processes such as Service Planning and Accreditation are carried out in an inclusive manner;
- ▶ Agreeing and developing methods to mainstream Partnership within the Organisation- to date various models have emerged including "Partnership Proofing all Committees within the Organisation"; Developing Local Partnership Committees within units/departments/areas; Designing/Promoting initiatives which will improve the staff/management interface, such as providing joint training on conflict management or team work training;
- ▶ Evaluating and measuring progress.

It is important to note that this is not an exhaustive list.

LOCAL PARTNERSHIP WORKING GROUPS

Partnership Committees can set up as many Local Partnership Working Groups (LPWGs) as necessary to progress certain issues. The types of issues that have been progressed at both unit and department level are:

- ▶ Improved patient services;
- ▶ Improved work environment;
- ▶ Quality of work life for staff;
- ▶ Strategic development and planning;
- ▶ New ways of working;

- ▶ Training, development and education;
- ▶ Communications.

Membership should reflect the stakeholders' interests, including representation from senior management. Suitable terms of reference and reporting arrangements should be agreed in respect of all sub-group work.

It is important that staff and/or management with expert knowledge in relation to the issues being examined are included in the membership of LPWGs.

COMMUNICATIONS AND TRAINING

It is recognised that the issues of communication and training are central to the partnership process.

COMMUNICATION

Effective and open communications are a cornerstone of successful partnership.

Systems of joint communication will be used with the objective of generating commitment to and understanding of the partnership process among all participants and avoiding the potential for interpretative difficulties.

The HSNPF will continue to work with Partnership Committees to promote and facilitate partnership throughout the health service. The HSNPF will also work with its constituent management and trade union organisations to help develop and promote health services partnership within those organisations.

Liaison and joint working with the National Centre for Partnership and Performance (NCP) will continue with the objective that the health service learns and benefits from NCP initiatives and that the NCP learns and benefits from the partnership experience in the health service.

Health organisations will work to ensure, through Partnership Committees, that systems for communication, consultation and participation by staff in the development of key organisational goals and objectives are in place. These communication systems must be designed to facilitate open communications, both upwards and downwards as well as across and between organisations. It is recognised that open communication systems facilitate cognisance of both management and staff viewpoints and contribute to an enhancement of mutual respect and trust. Partnership Committees may take on the key role of monitoring the effectiveness of these communication systems.

TRAINING

The HSNPF advocates that a partnership ethos should underpin all training initiatives in health service organisations and trade unions.

In addition to the general provision of appropriate training inputs on partnership issues, the HSNPF will continue to develop and refine its training programme for Joint Chairs, Partnership Committees and LPWGs. This training programme will facilitate members of such groups in developing their competencies in areas such as:

- ▶ Understanding workplace Partnership
- ▶ Communications appropriate to the Partnership process
- ▶ Group dynamics and interaction
- ▶ Joint problem solving
- ▶ Consensus decision-making
- ▶ Tools for change through Partnership

and other areas that may be identified in the future.

It is recognised that members of LPWGs will normally have expert knowledge in relation to the issues being examined by their groups.

The HSNPF will promote the inclusion of modules on partnership in training programmes delivered by health service organisations and trade unions such as induction, management development, shop steward and other training. Joint training involving managers, staff and staff representatives will also be promoted in areas such as Dignity in the Workplace, conflict resolution, grievance and disciplinary procedures and other areas, as appropriate.

HSNPF STAFF

Working with and on behalf of the HSNPF, the HSNPF staff facilitates, supports, promotes, measures and evaluates workplace partnership in the health services. The staff provides independent support to all stakeholders.

The HSNPF staff possesses a range of skills and provides services to partnership committees and their Local Working Groups and to all the different stakeholders to support the developing partnership agenda. These skills and knowledge include:

- ▶ Partnership principles
- ▶ Facilitation skills

- ▶ Communications skills
- ▶ Presentation skills
- ▶ Training Skills
- ▶ Understanding IR/HR concepts and processes
- ▶ Consensus decision making
- ▶ Team Building and Team Facilitation
- ▶ Effective team processes including task, process and relationship elements - goal setting, brainstorming, SWOT, data analysis, self-evaluation
- ▶ Getting to Yes - Joint Problem Solving – Interest Based Bargaining
- ▶ Service planning
- ▶ Integrated conflict management systems & mediation processes
- ▶ Design, organisation, facilitation and management of workshops, seminars, conferences and other consultation processes
- ▶ Organisational development and change management skills (including whole systems change processes)
- ▶ Project Management (including measurement & evaluation)
- ▶ Supporting and assisting colleagues, facilitators, managers and trade unions in achieving partnership goals and objectives.

PROTOCOL ON
HANDLING
SIGNIFICANT
CHANGE THROUGH
PARTNERSHIP

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PROTOCOL ON HANDLING SIGNIFICANT CHANGE THROUGH PARTNERSHIP

The aim of this protocol is to help managers, trade union representatives and employees working through partnership in the Health Services to handle significant changes with confidence. The protocol lists the types of issues that managers and trade union representatives have identified as being important to address through partnership in the interests of improving services to the public and the quality of working life of managers and employees. The protocol sets out a framework within which managers and union representatives may raise significant issues and agree on appropriate mechanisms for handling them. The protocol also sets out a number of supports that may be called on by the parties in the event that difficulties arise.

WHY IT IS IMPORTANT TO ADDRESS SIGNIFICANT ISSUES

It has become clear from recent discussions at national level that senior managers and trade union representatives want to achieve more through partnership than is presently being achieved. It has also become clear from recent reviews of partnership that managers, trade union representatives and employees across the Health system all agree that more can be achieved through partnership processes than is currently being achieved.

It has become increasingly clear that the extent to which significant benefits will come from partnership will depend on the extent to which the parties are prepared to put significant issues into the partnership process. This protocol is intended to help the parties do this by offering an effective framework and effective supports.

AFFIRMATION

In proposing this protocol for handling significant change in the Health Services, we, the parties acknowledge and affirm that:

- ▶ In taking this initiative, we are seeking to address change in a proactive manner, based on the interests and needs of all stakeholders. The protocol allows us to explore options and to collaborate on a range of change issues, rather than resist or impose change and defend positions across the table.
- ▶ Nothing in the protocol interferes with the rights of the parties to pursue matters through other avenues, including the full range of agreed industrial relations procedures.

- ▶ The scope and strength of the statement of common interests, agreed by Forum members on 7th December 2005, which can be seen on pages 28–31 of this document, underpins the new approach of the stakeholders to handling significant change and allows us to move forward with confidence, as partners, to address the following areas:
 - ▶▶ Development of better services for patients and service users;
 - ▶▶ Creation of a better work environment;
 - ▶▶ Increased value for money;
 - ▶▶ Improvement of management/staff/trade union relationships.
- ▶ The evidence suggests that a world-class health service can best be achieved through a “whole systems”, partnership approach that involves management, staff and their trade unions in all stages of the process.
- ▶ The process of involving staff and their representatives at an early stage in policy, planning and decision-making, is consistent with a world-class approach.
- ▶ The approach to change in the health service will be underwritten by this belief that opportune outcomes and performance will be achieved through strong Trade Unions and strong Management working collaboratively.

PROPOSED FRAMEWORK FOR IMPLEMENTING SIGNIFICANT CHANGE THROUGH PARTNERSHIP

The following framework proposes a *methodology* that can enable the existing structures and systems to operate more effectively. It is designed to build on the suggestions made by management and trade union representatives through the consultation process. The proposed framework does not call for the creation of new structures but rather concentrates on leaving existing structures and processes to complement each other under the overall guidance of senior management and senior trade union representatives.

National Level

At national level there will be:

- ▶ A forum involving the Secretary General of the Department of Health & Children and other Senior Departmental Officials, Chief Executive Officer of the HSE and senior HSE officials and senior full-time trade union officials to allow these partners to engage with each other around the implementation of the national policies and strategies in the spirit of partnership.

- ▶ Ground rules for these meetings could include privacy, inclusiveness and openness, a commitment to action and regular and visible communications. These meetings will focus on:
 - ▶▶ Strategic developments, change and reform in the Health Services;
 - ▶▶ Fostering ownership of the strategy;
 - ▶▶ Building trust between the partners;
 - ▶▶ Sequencing the implementation of aspects of the national policies and strategies;
 - ▶▶ Identifying major issues likely to arise and the stakeholders that need to be involved;
 - ▶▶ Channelling issues into appropriate change management processes – joint problem solving or industrial relations at national or local levels;
 - ▶▶ Monitoring the progress of issues initiated through these meetings;
 - ▶▶ Time frames;
 - ▶▶ Evaluating the success of the process in implementing change.

Local Level

At local level there will be:

- ▶ A forum involving Hospital Network Managers, Local Health Office Managers and other senior executives, the members of the local partnership committee and the relevant full-time trade union officials to allow these partners engage with each other around the implementation of changes, developments and improvements in service in the spirit of partnership.
- ▶ Such meetings will focus on:
 - ▶▶ Plans for forthcoming changes and developments;
 - ▶▶ Fostering local ownership of changes and developments;
 - ▶▶ Building trust between the partners;
 - ▶▶ Sequencing the implementation of aspects of the national policies and strategies;
 - ▶▶ Identifying major issues likely to arise and the stakeholders that need to be involved;
 - ▶▶ Channelling issues into appropriate change management processes – joint problem solving or industrial relations at national or local levels;
 - ▶▶ Monitoring the progress of issues initiated through these meetings;

- ▶▶ Sharing information regarding the challenges facing the organisation/agency and the parties in the short to medium term;
- ▶▶ Identifying priority issues that management or trade unions want to progress;
- ▶▶ Identifying concerns that staff may have;
- ▶▶ Agreeing how issues might be best handled i.e. through partnership or industrial relations;
- ▶▶ Agreeing how issues should be framed, appropriate terms of reference, resources and time frames for addressing issues;
- ▶▶ Evaluating the success of the process in implementing change.

Management and trade unions will communicate to their constituents regarding agreement on how the issues are going to be handled.

This approach should be seen in the context of ongoing efforts to improve services, to develop partnership, to improve industrial and employee relations and to enable the health service to adapt to its changing environment in the spirit of partnership.

“In accordance with the partnership approach, unions will be informed in advance of all new significant workplace-related initiatives, the reasons for them and the proposed implementation date. Notification will be given in advance and in sufficient time to allow discussions with the union(s) concerned to take place. Such discussions will cover the nature of the changes involved, the reasons for them and any impact on staff. The discussions will be approached in a partnership manner and will be concluded in time to allow the changes to be introduced by the date specified”.¹

This statement will be applied in the health services in a manner that encourages and facilitates the proactive involvement of staff and trade union representatives in the consultation and development stages of significant change initiatives, as envisaged in the Action Plan for People Management, consistent with the Framework for Dispute Resolution in the Health Services.

¹ *Sustaining Progress* – Social Partnership Agreement 2002 - 2005

LIST OF SIGNIFICANT ISSUES

It is not possible to define precisely what constitutes a significant issue. Nevertheless, a number of issues have been suggested by managers and trade union representatives as falling into this category and they are listed here (this is not intended to be an exhaustive list):

- ▶ Changes in work organisation and structures;
- ▶ The further development of effective human resource policies and practices in areas such as recruitment and selection, induction, training and development, anti-bullying policies, gender equality policies, family friendly working arrangements, health awareness and testing practices, performance management systems etc.;
- ▶ The Policy Framework for Public Private Partnerships (section 4.22 of Sustaining Progress) & agreements between the Social Partners;
- ▶ Improvement of employee career paths to reward employees and increase motivation;
- ▶ Improvement in the conduct of industrial relations including the operation of grievance and disciplinary procedures and negotiation arrangements, separate and joint management and trade union training, so as to reduce conflict, improve relationships and create a climate conducive to organisational change;
- ▶ Employee involvement in the development of service plans and strategies;
- ▶ Issues relating to the job security of employees;
- ▶ The introduction of new organisation structures;
- ▶ The expansion of performance management systems;
- ▶ Development of agreed ways of introducing organisational changes and addressing the skills needs of those involved in the change process;
- ▶ The expansion of value for money initiatives;
- ▶ The development and further implementation of performance indicators;
- ▶ Ensuring that all health and safety requirements are in place;
- ▶ Assisting effective communications;
- ▶ Improvement of the physical accommodation available to staff and service users.

JOINT COMMUNICATIONS OF SERVICE IMPROVEMENTS

In the spirit of partnership, management and trade unions agree that, where appropriate, achievements in the area of service improvement, quality improvement, enhanced accessibility etc., should be the subject of joint communications. This is necessary to develop a sense of confidence and improved morale among staff and signal clearly that there are benefits in partnership and participative approaches to handling change.

PARTNERSHIP PROCESSES

Recent reviews have highlighted the value of partnership as an alternative method of raising and addressing issues to the traditional adversarial industrial relations approach. The partnership process is not intended to compromise or undermine in any way the accountability of managers to decide or determine issues that are clearly their responsibility nor is it intended on the other hand to interfere in any way with the accountability of trade unions to engage the industrial relations machinery, processes and procedures to represent their members. Instead, it is designed to enhance the operation of both these systems to the extent that the partnership process itself will not work effectively in the absence of good management and industrial relations systems and practices.

The partnership process provides a neutral ground on which managers can meet staff and their representatives to tease out their various perspectives on the issues facing each and on the opportunities and constraints in changing or improving how things are done. Where there is agreement between management and trade unions, many issues can be decided and implemented through partnership and in cases where there is no agreement, much progress can be made through partnership to ensure that differences are resolved in ways which retain the confidence, trust and morale of all staff in the way conflict or differences are managed.

Where there is agreement to have certain matters decided or implemented through partnership the problem-solving aspect of partnership is seen as one of its main strengths. In this context it will be important for local management and trade union representatives to be familiar with the two main problem-solving approaches and to become adept in their use:

- ▶ Joint problem solving when there is broad agreement around the necessity for a particular change and where the parties want to work together to find the best solution
- ▶ Interest-based problem solving when there is broad agreement around the necessity for a particular change but different interests among management and staff that need to be factored into the pursuit of a best solution.

HANDLING INDUSTRIAL RELATIONS ISSUES

There are well-established local and national industrial relations structures and processes in the health services and it is not proposed to interfere with these. There are times, however, when the way issues are handled through industrial relations affects the partnership process. For example, where an issue or part of an issue is moved from partnership into industrial relations it will be important for the partnership committee to be kept informed of progress and to be informed when matters have been brought to finality. Where a major industrial relations issue is affecting relationships generally within the workplace it is likely to also affect relationships within the partnership committee. In such a case it will also be helpful for the partnership committee to be kept informed of progress and to be informed when matters have been brought to finality.

PROTOCOL FOR HANDLING DIFFICULTIES AND BREAKDOWNS

The parties agree that where an issue being handled through partnership runs into difficulties or discussions break down the following steps should be followed:

- ▶ The services of the local partnership facilitator should be availed of to explore how the situation might be unblocked;
- ▶ Should the issue remain unresolved it should be referred to the management/trade union meeting which may decide on a mechanism to progress the matter, to appoint a third party facilitator, or if these mechanisms are not agreed to, refer the matter to the industrial relations process or to the HSNPF;
- ▶ The parties undertake to make every effort to seek a timely and workable solution at local level and in any event to continue meetings of the partnership committee without interruption.

STRENGTHENING LINKS BETWEEN MANAGEMENT REPRESENTATIVES AND SENIOR MANAGEMENT TEAM

In order to ensure that there are strong links between management representatives on partnership committees and the senior management team:

- ▶ Issues being handled through partnership will be a standing item on the senior management team meetings agenda in each area;
- ▶ The senior management team will receive reports from their representatives on the partnership committee on a regular basis and receive appropriate input;
- ▶ The senior management team will encourage and support their representatives on the partnership committee.

STRENGTHENING LINKS BETWEEN TRADE UNION REPRESENTATIVES AND TRADE UNION STRUCTURES

In order to strengthen the links between trade union representatives and the trade union structures:

- ▶ The development of partnership and partnership issues will be a standing item on all branch or other relevant trade union meetings;
- ▶ Representatives on partnership committees will report to branch meetings on developments in partnership;
- ▶ There should be regular meetings between partnership representatives and full time officials to exchange information with regard to issues being resolved through partnership;
- ▶ Minutes of partnership meetings should be circulated to trade union officials and to all local representatives even those not involved on the partnership committee;
- ▶ Trade union officials should provide support and training for representatives on partnership committees.

ENLISTING THE SUPPORT OF FACILITATORS IN INFORMATION AND TRAINING

Partnership facilitators have the role of deepening partnership in the health services, and, in particular, supporting the local partnership committees and sub-committees and promoting partnership at local level. Partnership facilitators therefore should:

- ▶ Be a key resource to the partnership committees and sub committees in assisting the design and management of partnership processes;
- ▶ Be a key source of knowledge regarding partnership developments throughout the system;
- ▶ Actively promote partnership among staff at all levels through information sharing and by delivering seminars and local training programmes;
- ▶ Participate, as required, in management and trade union training and communications/plans.

ROLE OF HSNPF IN LEADING AND SUPPORTING THE DEVELOPMENT OF PARTNERSHIP

It is agreed that in order to enable partnership to deal with significant issues it needs the support and guidance of the HSNPF. In particular:

- ▶ HSNPF will make priority funding available to parties that are developing partnership and dealing with significant issues within the framework established here;
- ▶ HSNPF will make funding available on an issue by issue basis in order to ensure that the infrastructure and capability is in place to enable partnership to deal successfully with significant issues;
- ▶ HSNPF will also put a structure in place to provide support and guidance and, where appropriate, direction in cases where issues cannot be brought successfully to conclusion locally;
- ▶ HSNPF will work closely with the principals on the management side and the trade union side to facilitate contributions to management development and training programmes and trade union representative training programmes to ensure that management systems and practices and the conduct of industrial and staff relations reflect the values and principles of the partnership approach.

HANDLING SIGNIFICANT CHANGE PROTOCOL – MODERNISATION FUND

- ▶ It is agreed that significant funding from the HSE Training & Development Budget would be provided in 2006 as an innovation fund for major change and re-training programmes (administered through the HSNPF) arising from the reform process and re-configuration of structures, roles and responsibilities.
- ▶ It is agreed by the parties that a significant percentage of this Partnership Innovation Fund be set aside for trade union and staff training where the Handling Significant Change Protocol has been formally accepted. The issue of facilities etcetera will be addressed in a separate document.
- ▶ It is agreed that a rigorous assessment of the benefits of this initiative for service users, staff and management, including documentation of the changes implemented during 2006 arising directly from the initiative will be undertaken prior to December 2006.
- ▶ It is the intention of the parties, subject to the above, to ensure that the Partnership Innovation Fund would be provided on an ongoing basis.

STATEMENT OF COMMON INTERESTS

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support

STATEMENT OF COMMON INTERESTS

At their meeting on 7th December 2005 management and trade union members of the Health Services National Partnership Forum listed the following **common interests** in working together through workplace partnership:

COMMON INTERESTS IN DEVELOPING BETTER SERVICES FOR PATIENTS

- ▶ To progress change and the pace of change
- ▶ To release potential through Partnership
- ▶ To improve the public perception of a high quality service
- ▶ To develop new and innovative ways of working
- ▶ To free up hospital beds
- ▶ To involve patients directly in service planning
- ▶ To tap into the knowledge of staff
- ▶ To involve staff in developing options for dealing with difficult issues
- ▶ To highlight what is working well
- ▶ To generate pride in the service
- ▶ To reorient the health service towards primary care
- ▶ To produce better health outcomes through team work

COMMON INTERESTS IN CREATING A BETTER WORKING ENVIRONMENT

- ▶ To develop a sense of team
- ▶ To enable more staff involvement
- ▶ To facilitate communication
- ▶ To generate a sense of organisational belonging and affiliation
- ▶ To further develop an already service-oriented staff

- ▶ To ensure greater job security
- ▶ To develop trade union organisation
- ▶ To protect terms and conditions
- ▶ To support personal development
- ▶ To meet staff expectations that there will be a partnership approach
- ▶ To directly involve greater numbers of staff through partnership than would be directly involved through the IR process
- ▶ To introduce greater consultation and better communications
- ▶ To value staff
- ▶ To provide training opportunities
- ▶ To influence the issues of outsourcing and public private partnerships
- ▶ To improve working conditions
- ▶ To improve health and safety
- ▶ To develop family friendly policies

COMMON INTERESTS IN ACHIEVING BETTER VALUE FOR MONEY

- ▶ To prove that partnership works in the health service and, through partnership:
 - ▶▶ Get it right the first time
 - ▶▶ Handle change with less conflict
 - ▶▶ Find more cost effective ways of providing the service

COMMON INTERESTS IN BETTER MANAGEMENT/STAFF/TRADE UNION RELATIONSHIPS

- ▶ To reduce and overcome industrial relations conflicts
- ▶ To enable better understanding of management/trade union/staff interests
- ▶ To reduce boundaries between all the stakeholders
- ▶ To develop trust
- ▶ To introduce greater accountability
- ▶ To provide opportunities for trade unions to influence decision making
- ▶ To allow access for trade unions to senior management
- ▶ To empower and involve workers
- ▶ To improve trade unions' involvement with the membership and improve facilities
- ▶ To work with all the trade unions and management on a common agenda
- ▶ To improve the scope and quality of decision making
- ▶ To be less confrontational
- ▶ To engage in whole systems change
- ▶ To find better ways of handling issues and dealing with grievances
- ▶ To provide networking opportunities for trade unions
- ▶ To grow trade union influence & involvement on a range of issues
- ▶ To build confidence among trade union members and to strengthen the voice of the trade unions in the system
- ▶ To provide a forum for addressing political issues

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Working Together for a Better Health Service