

PERTH & KINROSS INTEGRATION JOINT BOARD

Wednesday 23<sup>rd</sup> March 2016

Health & Social Care Joint Workforce and Organisational Development Strategy

Report by Chief Officer

**PURPOSE OF REPORT**

The purpose of this report is to update the Board on the work currently being undertaken in relation to the development of the joint Workforce and Organisational Development Strategy and to request formal sign-off of the document.

**1. BACKGROUND**

- 1.1 The Public Bodies (Joint Working) (Scotland) Bill Notes<sup>1</sup> Sections 52-57 detail the Organisational Development duties placed on the Partnership and emphasises the need for *“sustained and integrated approach by partners to organisational and professional/management development, in addition to effective, on-going education and training for a wide range of staff groups”*

*It suggests that “supporting partnerships to understand and build the conditions for change and improvement will be necessary for sustained success in delivering better outcomes for people and communities. Statutory partners will need to ensure that their organisational development plans reflect the integration agenda and offer a comprehensive, systematic and practical approach to improving individual and organisational effectiveness. This shared endeavour will be necessary to support the **culture change** that will be required to underpin greater multi-disciplinary and multi-agency joint working and to reflect the move towards a greater community focus for service planning and delivery”*

The Bill ‘Notes’ state that an Organisational Development programme that integrates existing partnership organisational development capacity with national support will be required to provide:

- Integration Joint Board and Integration joint monitoring committees development sessions, including work locally on the development of a shared set of values, purpose and vision for the Board and its members
- Development sessions for Health Board non-executive directors and local authority elected members
- Supporting the development of skills and behaviours needed for the chief officer posts; Targeted programme of support for Health Board and local authority chief executives and chief officers
- The Scottish Government will work with national partners via public sector leaders forum to support development for key groups of staff and professionals

<sup>1</sup> <http://www.scottish.parliament.uk/parliamentarybusiness/Bills/63845.aspx>

- Development support for senior professional teams, including GPs and Chief Social Work Officers to lead change within localities and as part of the strategic commissioning process locally
  - Support for staff working in non-statutory organisations.
- 1.2 At a meeting of the Integrated Leadership Group (ILG) in September 2015, it was agreed that a short-life working group would be constituted to develop a Workforce & Organisational Development Strategy required, as a result of, the Integration of Health & Social Care. The membership of the group was to comprise OD, Training and HR representatives from across the NHS, Local Authority and third sector interface PKAVS. Governance and accountability was agreed through the reporting structure of the newly formed Health & Social Care OD, Communication & Engagement Steering Group jointly chaired by Helen MacKinnon, PKAVS and Diane Fraser, Head of Community Care.
- 1.3 Following the first meeting of the short-life working group, a joint Workforce & Organisational Development Strategy was drafted and circulated as part of a formal consultation process. The final draft strategy (Appendix 1) reflects comments and feedback received to date throughout the consultation period.
- 1.4 The short-life working group continues to meet to complete the Joint OD and Workforce Plans which will underpin the key messages and outcomes identified within the Workforce & OD Strategy. The OD plan has been commenced and will be finalised no later than April 2016.
- 1.5 Discussions with HR colleagues across Health and Social Care have commenced around the required workforce activity and planning. It was agreed that a separate workforce group would meet to begin the process of developing a detailed workforce plan. Initial collation of respective workforce information and data has been undertaken with a view to the completion of the workforce planning document which will underpin the implementation of the wider workforce elements of the strategy. Anticipated timeframe for completion of the Workforce Plan is December 2016.

## **2. CONCLUSION AND RECOMMENDATION**

Work has taken place which will ensure the delivery of the Organisational Development duties placed on the Partnership by the Scottish Government. The Strategy has been written and has been through a formal consultation period with key stakeholders across the partnership. The activity identified within the strategy will ensure that we support and build an effective workforce as part of the new integrated partnership.

- 2.1 It is recommended that the Board:-
- Approves the direction outlined in the joint Workforce & OD Strategy
  - Agrees to the commencement of the short-term organisational and learning & development activity noted within the Joint Workforce & OD Strategy

- Approves the continued collection of workforce data analysis to enable future influence around the medium to longer term delivery of workforce and OD planning
- Approves the commencement of Communication & Engagement activity related to the OD and workforce requirements, in line with the Participation & Engagement Strategy recently approved, at the Integrated Joint Board in January 2016
- Reviews progress against the finalised Joint OD Plan in June 2016 to ensure alignment with partnership priorities.

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**Date of Paper:** **12<sup>th</sup> February 2016**





## Perth & Kinross Health & Social Care Partnership

# Workforce & Organisational Development Strategy

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Developing and Supporting our Workforce

Lesley Sinclair, Service Manager SDS and Learning & Development, Perth & Kinross Council

9<sup>th</sup> March 2016

Version 8

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## Introduction

Health and Social Care integration is potentially the greatest reform facing public sector since the inception of the NHS. Prior to 1948, healthcare was available mainly to the wealthy and social care only to the most deprived. Born of different law, healthcare became a universal service free at the point of delivery with social care remaining a means-tested service to protect the most vulnerable in society. We are now bringing these cultures together. Some now speak of the perfect storm facing public services in the 21st Century where if we stay with traditional models of service, demand will rapidly outstrip our ability to deliver. At the same time, society's needs are changing. People are living longer into older age as a result of better homes and better nutrition; by advancing medical technology that has addressed many of the killer diseases of the early 20th century. Legislation has driven better choice and greater personalisation of support however, these improvements are not universal; those in deprived communities still live 10 to 15 years less than those who are well off.

Traditional solutions offered by health and care services are no longer sufficient for the needs of our communities. We need to anticipate the predictable effects of aging and the avoidable consequences of waiting for a crisis. We need more people to be involved including families, neighbours and communities. Through sharing health and care skills required to support people in older age, we can direct public services to those most in need but this change, requires our workforce to adapt, to develop new partnerships and to demystify and create language and skills that are open to the many. For this we need to provide space and time to the development of our staff. We need to change the way we operate, be able to anticipate more, become more responsive and embrace technology to move away from services based around buildings alone. Health and Social Care professions are underpinned by shared principles of compassion and service. Recent research celebrates the strength of these important human attributes in the future success of the public sector. Compassion is required to ensure our focus remains on the people we serve and is essential in creating the flexibility to change as the needs of people change. Compassion is highly influential in embedding positive behaviours and attitudes in working relationships across teams, professions, communities, third and independent sectors. So while our approach will continue to be 'rooted', in every aspect of leading and developing integrated services with its principles, underpinning the development of integrated teams, improved health & social systems, we will give equal emphasis to the development of personal and professional effectiveness for individuals and teams on their journey of learning, innovating and growing.

Organisational Development is a deliberately planned, organisation-wide effort which seeks to increase an organisation's effectiveness and efficiency and enable us to achieve our strategic goals. It encompasses the aspects of system, people and process development in holistic and person centred way and emphasises the significant feature of culture and its impact on the workplace. Culture and lived values of an organisation are very important for its success and for workforce morale. These in turn, have a material effect on the quality of service, the enthusiasm of staff to go the extra mile and on recruitment and retention. The

strength of a team and their sense of belonging are even more important for success in essential health and care services.

Organisational Development is everyone's business; it is not for the few, but for everyone involved in planning and delivery of health and care. Whether working in a statutory, independent or third sector organisation, as a carer or as a service user, everyone is facing the need to adapt to the changes that will be brought about by the new partnership. By acknowledging that alternative ways to work exist, we will aim to address, the issues of equity of access to preventative support for the most deprived people in Perth & Kinross. This will only be successful, if we use all resources and assets across sectors and enable commissioning decisions to be made with the agreement of local people. Communities will be the engine rooms of integration and the right cultures and behaviours must be embedded in localities from the beginning.

Building and managing community relationships is going to be an integral skill for staff and communities involved in the planning and delivery of health and social care services. Therefore, in order to create the right framework for co-production to flourish, the partnership's staff will benefit from capacity building skills to engage and collaborate in the early stages of development. The interventions proposed within this strategy and the OD plan accompanying it, will ensure that engagement, collaboration and building relationships, are one of the core principles taken forward and the Strategic Plan makes a strong commitment that community stakeholders will receive the same.

# Chapter 1; Drivers, Priorities & Purpose

## Purpose

The purpose of Perth & Kinross Health & Social Care Partnership Organisational Development & Workforce Strategy is to draw together the strategic objectives, priorities and values of the organisation and interpret them through the design, development and operational delivery of our services.

It aims to improve outcomes for service users by developing the right skills, attitudes, performance and behaviour in our workforce to ensure that at the core of everything we do, our compassion and care will enable the partnership to achieve sustainable success for the people we serve and the communities with which we work.

The strategy aims to build upon past achievements and to reflect the current and future aims, priorities, challenges and opportunities for the Health and Social Care Partnership in Perth and Kinross.

This strategy covers the short and medium term. It will be reviewed annually to ensure it remains 'fit for purpose' and that it develops with the changing priorities for the Partnership, its leaders, staff and, most importantly, the people who live in Perth & Kinross.

## Key Drivers and Strategies within Perth & Kinross Health and Social Care Partnership

We have identified 5 priority areas based on a shared vision for the future of Health & Social Care, through what we have learned from and about the population of Perth and Kinross. The themes have been identified from community stakeholder engagement and through lessons learned from local and national initiatives elsewhere, as described in our Joint Strategic Commissioning plan:

1. Prevention & Early Intervention
2. Person centred health, care and support
3. Work together with communities
4. Inequality, unequal health outcomes and healthy living
5. Making the best use of available facilities, people and resources

It is critical that we consider the specific needs of Tayside-wide services hosted in Perth and Kinross and the skills which may be required to manage change. Further work will be done to ensure that these needs are included within future OD Plans. The following services, will be hosted by the Perth & Kinross Health & Social Care Partnership,

- Learning Disability inpatient services
- Substance misuse inpatient services
- Public Dental Services/Community Dental Services
- General Adult Psychiatry (GAP) Inpatient services
- Prisoner Healthcare
- Podiatry

## **Areas of Focus for Organisational Development**

The need to support and develop the workforce at all levels has to be balanced against the requirement to consistently deliver high quality services within our communities. We are working to strengthen our approach to OD and to prioritise our activities on the basis of need. The momentum and continued development of OD activity is focused on three key themes:

- Leadership and Management
- Support and Development and
- Communication and Engagement

It is people who deliver change, and it is through their talents and ambitions that real improvements in services and outcomes will be made. We will think beyond structures to nurture the right cultural conditions and support new ways of thinking, behaving and working across the wide range of organisations and individuals involved.

Short-term OD priorities:

- Establishing a baseline understanding of what integration means to staff across our partnership
- Establishing what concerns and challenges there are for the partnership
- Identifying the skills required to support Integration for staff, leaders and communities
- Building relationships and raising the profile of the partnership
- Identifying and developing opportunities to embed the required culture

Medium-term OD priorities:

- Build capacity within our partnership workforce, individuals and communities by increasing skills and identifying waste variation and harm
- Build confidence in new skills and initiatives that will support Integration
- Develop new ways of thinking, identify understand and consolidate a shared culture

Long-term OD priorities:

- Fully embedded, integrated working across the partnership
- Culture change across all partner organisations is evident in attitudes and behaviours
- Communities we work with, will have fully embraced our workforce and are active in co-producing fully integrated services

### **Key principles of Integrated Culture Change**

- Change for Improvement
- Partnership and Collaboration
- Supporting and Promoting Change
- Workforce and Community Engagement

## **Values and Behaviours**

As a High Functioning Partnership, we anticipate being able to evidence;

- Compassion – for our service users, for their carers and for each other
- Integrity and honesty
- Reliability we do what we say we will do
- Energy and enthusiasm for high quality work
- A commitment to express full individual and collective potential capability to do what is expected or required
- Willingness to take the initiative and to be pro-active and creative
- Co-operation and commitment to work with others for the common good.

## Chapter 2; Workforce Development

### Partnership Workforce

The integration of health and social care is one of the biggest structural changes within the public sector in Scotland for many years. The Perth & Kinross Health and Social Care Partnership has now been established under the provisions of the Public Bodies (Joint Working Scotland) Act 2014. A number of other national initiatives will impact on how services are planned, commissioned and delivered and as a result impact on the size, structure and organisation of our workforce. These include:-

- *Public Service Reform*
- *Community Empowerment*
- *National Health & Well-being Outcomes*
- *NHS Scotland 2020 vision*
- *Healthcare Quality Strategy for NHS Scotland*
- *Shifting the Balance of Care for Older People*
- *One Scotland – Programme for Government*
- *Francis/ Keogh Reports*
- *Financial pressures and health strategy*

In addition to these initiatives and pressures, which will have implications for workforce size and organisation, we need to recognise factors which will impact on recruitment & retention within our workforce. These factors are national drivers which will impact on staff supply and availability and include, but are not limited to:-

- *Labour market constraints and increasing competition for skilled staff*
- *Regulator, Royal college and Professional Body staffing guidelines*
- *Rigidity of reward and the NHS/Local Authority pay and terms and conditions*
- *Changing NHS and wider pension arrangements*

### The Local Context

People are at the heart of everything we do. The Health and Social Care Strategic Plan sets direction and shapes our approach to our workforce and development strategy. As the Strategic Plan evolves over time, we will develop the workforce plan to underpins the key objectives and to focus on effectively supporting leaders, managers and employees to develop more sophisticated ways of working together. A healthy and resilient workforce requires investment to grow the cultural conditions that enable people to offer their insight, expertise and creativity for the benefit of colleagues and those they serve.

The 5 priority areas outlined in Chapter 1 of this document are based on our vision for Health & Social Care Integration, our knowledge and understanding of our population through our learning from stakeholder engagement from evaluation of local and national initiatives. The shift in emphasis towards prevention, early intervention and community-based care will require a shift in our resources and development of new workforce skills to support the delivery of this change .

Working in partnership with the third sector and with communities is recognised to improve people's quality of life through delivering a wider range of high-quality, person-centred care that is delivered according to the needs of all, particularly those who are vulnerable or living in areas of deprivation.

Perth and Kinross has been divided into 3 localities to support planning and delivery of local services:

1. North Perthshire
2. South Perthshire, and
3. Perth City.

Reliable, sustainable delivery of locally based integrated services requires a confident, competent professional workforce who are supported and valued. The workforce plan will increase opportunities for all employees to be involved in driving change, to develop their talents and expertise to manage the issues faced by people across Perth and Kinross. Careful workforce planning, organisational development and good financial management will support the Partnership in attracting and retaining the highly skilled workforce we will need in future.

## **Workforce Planning**

Workforce planning is about ensuring that an organisation has the right people with the right skills in the right place at the right time. This is crucial for sustainable, efficient and effective service delivery. Both NHS and Council have workforce plans that will be used in the early stages to support development of the joint workforce plan for the Health & Social Care Partnership.

We will apply the principles of the PPMA Business-Workforce Dialogue to identify and support the planning aspect of organising our workforce during this period of change to joint working in the partnership. In doing so we will focus on the following questions:

- What will we do and how will we be organised?
- How will we get the right people with the right skills?
- How will we need to behave?

Consideration needs to be given to any potential implications which may exist for the partnership in relation to, the Council's aspiration to become a living-wage employer both for commissioned services and as direct employers.

## **Shape & Size of the Workforce**

The shape and size of our workforce will evolve with changing demand for services in the context of pressure on public finances. We will need to structure our workforce using effective organisation design principles to enable it to support a flexible service delivery. The Health & Social Care Partnership arrangements will need to design new roles and redesign existing ones to reflect the changing skills and competencies required to meet the needs of the patients/clients. The creation of

Job Families and shared skills and competencies will support flexible deployment of staff and expertise across the localities.

The Partnership will develop effective workforce planning through providing managers with effective and useful workforce data. Workforce planning will include initiatives in the public sector and community partners to address future challenges in these areas. The key elements are:

- Workforce Numbers
- Reshaping and Transformation
- Gender
- Age
- Vacancies and Turnover
- Peripheral Workforce/Short Term Resourcing
- Workforce Development/Employee Engagement

The current workforce profiles for the Health & Social Care Partnership is outlined in Appendix 2

### **Supporting Health & Wellbeing and a Safe Work Environment**

Our people are our greatest asset – and they are community assets too. Our joint approach to health and wellbeing recognise the link between employee wellbeing and our responsibilities to the communities. The NHS staff Governance Standard - provides staff with a continuously improving and safe working environment, promoting the health and wellbeing of staff, patients and the wider community.

- Support for Healthy Working Lives
- Support for work-life balance policies and initiatives
- Well-being programmes and support
- Fair Work Agenda

### **Supporting Organisation Development**

Effective Organisation Development will play a key role in developing a workforce that is capable of successfully meeting the objectives for the future.

Local services will develop their own workforce and OD plans that will feed into the over-arching Perth & Kinross Health and Social Care Partnership Plan.

### **Timescale**

An integrated workforce plan will be developed over the next 12 months to enable the sharing and analysis of system wide information across health and social care and their partner organisations. This will link directly to the Health and Social Care Strategic, Partnership Engagement and Organisational Development Plans. The Integrated Joint Board has responsibility for the strategic direction and development of workforce planning, for prioritisation, monitoring and review of the plan.

## Chapter 3; Learning & Organisational Development

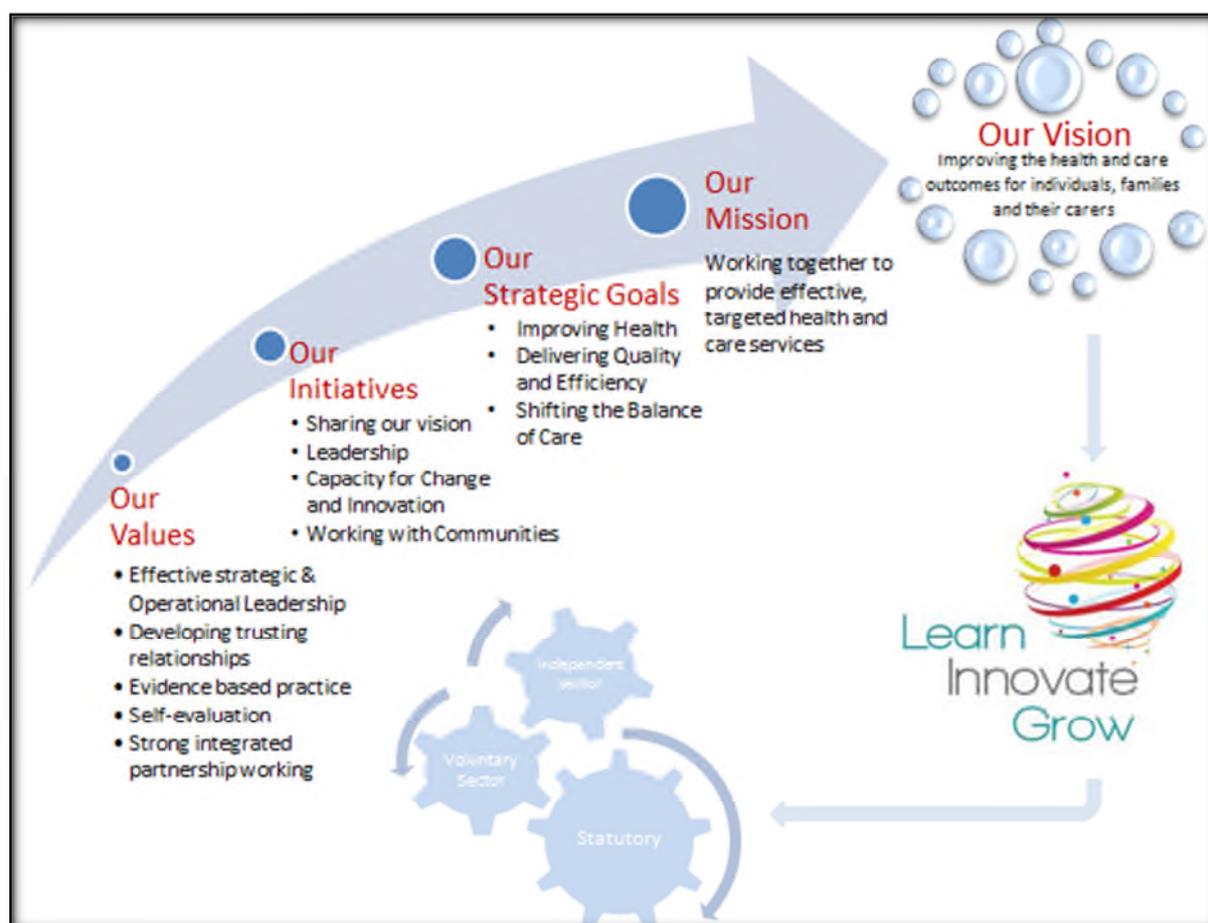
### What is meant by Organisational Development?

Organisational Development (OD) describes the actions that organisations take to achieve significant and continuous improvement in delivering their corporate aims and objectives. It is not only about learning, development and training; it is about taking a whole organisation approach which draws together all of the elements that contribute to building an effective and high performing organisation.

### What is meant by Learning & Development?

The official and ongoing educational activities within an organization designed to enhance the fulfilment and performance of employees. Training and development programs offered by a business might include a variety of educational techniques and programs that can be attended on a compulsory or voluntary basis by staff<sup>1</sup>.

### Model of Organisational Development in Perth & Kinross



The model above illustrates four key steps required to achieve our vision of "Improving the health and care outcomes for individuals, families and their carers".

<sup>1</sup> <http://www.businessdictionary.com/definition/training-and-development.html>

As a partnership, we must be clear on our values, understanding how and when to act to support delivery of our strategic goals. In improving health, delivering quality and efficiency and shifting the balance of care within the communities we must creatively support people to work together; to learn, develop and grow.

## Current approach to Organisational Development

Our existing and planned Organisational Development initiatives seek to support and raise understanding and awareness across four themes;

### 1. Sharing Our Vision

Engaging across our partnership at all levels to share understanding and ownership of our aims and ambitions for Health & Social Care Integration.

### 2. Leadership

Supporting and developing our leaders and managers to inspire and mobilise innovation, improvement and collaboration across our integrated working.

### 3. Capacity for Change, Improvement and Innovative Approaches

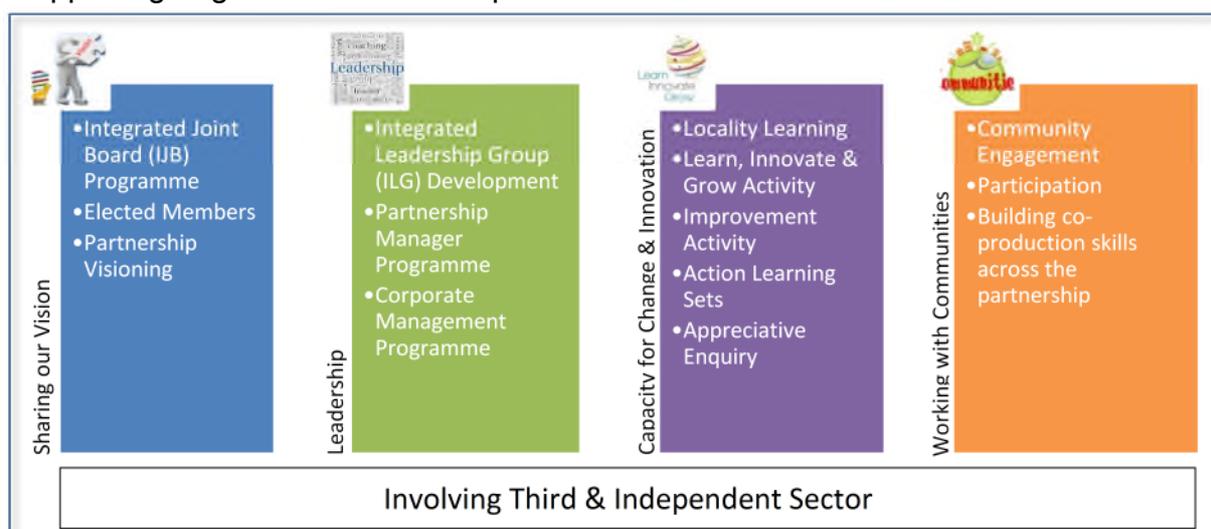
Creating and nurturing a culture where change, improvement and innovation are central to creating better outcomes.

### 4. Working with Communities

Recognising that real improvements can only be achieved with the support and involvement of local people and providing our workforce with the tools and opportunity to effectively work with and within our communities.

Graphic 1 illustrates how, from a workforce and organisational development perspective, this approach will enable us to support our workforce to deliver our vision. Key priorities identified within the joint Strategic Commissioning plan are taken forward and stakeholders engaged throughout our journey towards integration.

## Supporting Organisational Development



Graphic 1; OD Priority Approach

## Theme 1 – Sharing our Vision

We will develop a Programme for the Integrated Joint Board (IJB), Elected Members and Lay Members which will ensure that we:

- Develop enhanced individual leadership skills to improve health and social care support
- Maximise self-awareness and commitment to personal development
- Support sustainability through the application of learning, coaching and supporting others
- Raise the profile of Perth & Kinross Health and Social Care Partnership
- Become champions and change ambassadors

Activity will focus on ensuring that the partnership has:

- Strong trust levels across and between partnership organisations
- A genuinely co-created vision across the partners, their customers and workforce and that everyone is clear around what the partnership will look and feel like

## Theme 2 – Leadership

The development of a Programme of support for all Partnership managers will be implemented to ensure that the Chief Officer Group and Integrated Leadership Group (ILG) have the necessary resources to:

- Promote applied leadership skills and knowledge in a fully integrated partnership
- Deliver a clear vision and promote leadership across the workforce and partners
- Ensure the development of others and support locality learning activity

We will also work together to equip senior leaders and managers with the necessary skills, confidence and drive to:

- Increase their confidence, knowledge and skills in managing within an integrated environment
- Actively provide a forum and space where participants can share and develop insight and experiences which will challenge and support each other going forward together

## Theme 3 – Capacity for Change & Improvement and Innovative Approaches

There is a partnership commitment to work with Localities and Teams to identify, shape and develop learning and development activity that supports learning and organisational needs into the future. The identification of materials, facilitation of learning activity and co-ordination of shared learning across teams and sectors will ensure a locality and team approach to change and improvement. Many employees

will need to access development that enables them to deliver high quality services throughout a period of change. This is a shared responsibility for individuals and their organisation. Each staff member is unique and will require support and development appropriate to their needs. In order to do this, we will:

- Promote active joint learning activity, identify innovative ways to support change and grow and test new initiatives which support change and improvement
- Encourage and develop new ways of working by identifying change initiatives, developing charters which support testing and ensure engagement of teams throughout the change process
- Provide an experienced and skilled workforce who are able to support learning through tools such as Appreciative Enquiry, Action Learning Sets and joint locality learning and peer support groups
- Support learning in the workplace

## Theme 4 – Working with Communities

The Community Engagement Strategy recognises that keeping people healthy requires more than high quality health and care services. We must involve the different perspectives, skills, knowledge and resources of professionals, service users and communities involved in services.

We will:

- Develop different ways of participation to suit the preferences and needs of different stakeholders.
- Support the development of skills to work better together
- Communicate the commitments of the Engagement Strategy with staff and stakeholders; understand their leadership roles and responsibilities.
- Provide community stakeholders with appropriate induction, training and support to fulfill their duties and responsibilities in formal meetings and processes.

## Chapter 4: Our Organisational Development Charter

The framework set out in Chapter 3 captures the interconnected steps required to enable and support health and social care integration in Perth & Kinross. These are:

### Change for Improvement

We will ensure our approach emphasises ways to **maintain, improve and enhance** overall health and social care services by raising the performance of individuals, teams and managers. Development plans will take into account national priorities and the achievement of partnership strategic objectives.

### Partnership and Collaboration

We will ensure our approach is founded on good partnership and collaboration, and is underpinned by full **involvement and participation** of staff and stakeholders.

### Supporting and Promoting Change

We will enable and ensure that our locality partners are supported to achieve **planned and systematic** approaches to sustainable organisational change. Evaluation will ensure that the service user remains the focus of everything we do.

### Workforce and Community Engagement

Those who work within the partnership play an integral part in influencing the shape and direction of everything we do. As change occurs, **workforce and community engagement and communication** remain critical to success. Regular and meaningful engagement and participation activity will be woven into key change programmes.

Staff and Stakeholders across all sectors will receive support to understand and develop skills to participate in collaborative partnerships and work co-productively. It is important for our workforces and communities to be heard, to see that their opinions count and make a difference.

We will seek the opinion of the workforce through inviting suggestions for improvement, and involvement in planning and decision making processes at community and service level. Workforce opinion will be gathered through a range of mechanisms, reflected in decisions and described in more depth through the Partnership Communication & Engagement Strategy.

### Whole Systems Approach

Change should not be planned in isolation or without consideration to the impact on the whole system. Organisational Development activity within the Partnership will be approached in a way that embraces **whole systems methodology** to take account of the inter-dependency between services, divisions, departments, agencies, staff groups and individuals.

It is important that the partners involved in delivery of Organisational and Learning & Development activity, actively support the workforce to achieve the goals set out in the Strategic plan. Individuals are empowered as equal partners in sustaining their Health & Wellbeing and employees of the partnership must be flexible enough, to adapt the ways in which they support individuals and communities. Table 1 outlines key expectations on the partnership in order to achieve and sustain this.

Key Stakeholder	Expectation to Support OD
Integration Joint Board (IJB)	<ul style="list-style-type: none"> <li>• Will own the Organisational &amp; Workforce Development Strategy and Plan to ensure alignment with the overall strategic objectives of the Partnership</li> <li>• Will scrutinise organisational learning &amp; development initiatives through regular reports on performance and evidence of impact.</li> <li>• Will participate in Board Development Events to maximise effectiveness as an IJB member.</li> </ul>
Chief Officer Group	<ul style="list-style-type: none"> <li>• Will provide direction, operational leadership and authority across the partnership and support to develop the skills, attitudes and behaviours for all staff to operate effectively in delivering the core business of the Partnership</li> <li>• Will establish a strong sense of team at every level of the organisation and with partners and service users developing the skills to manage the scale and spread of the IJB's responsibilities.</li> <li>• Will participate in Board Development events and other forms of learning to maximise effectiveness in leading Perth and Kinross H&amp;SC partnership</li> </ul>
Integrated Leadership Group (ILG)	<ul style="list-style-type: none"> <li>• Will ensure that locality leaders integrate Learning &amp; Organisational Development activities, in preparing their teams to support changes in service delivery.</li> <li>• Will personally demonstrate adaptive leadership, skills and knowledge in their approach to integrated working</li> <li>• Will deliver a clear vision for leadership of effective, integrated working, in sustaining solution focused attitudes and behaviours across the workforce and all their partners</li> </ul>
Partnership Managers and Professional Leads	<ul style="list-style-type: none"> <li>• Will integrate Learning and Organisational Development activity across their teams to enable positive change</li> <li>• Will use supervision and annual appraisal to improve performance through identifying development needs and integrating improvement processes appropriate to the scale of partner organisation.</li> <li>• Will coach and mentor leaders in development of their teams, working with partnership colleagues, learning and development professionals to ensure locality learning is focused on achievement of the Partnership's goals</li> <li>• Will encourage and support a range of learning opportunities for the workforce, including personal development for career progression and succession planning</li> </ul>
Partnership Workforces	<ul style="list-style-type: none"> <li>• Will take personal responsibility for identifying and taking forward their own learning needs as part of their personal development and performance appraisal</li> <li>• Will ensure they develop the skills and knowledge to work to the top of their licence and be an asset within their team, their locality and the Partnership.</li> </ul>

Key Stakeholder	Expectation to Support OD
Learning & Organisational Development Co-ordinator	<ul style="list-style-type: none"> <li>• Will consult with senior and Partnership Managers on Learning and Organisational Development priorities and act as facilitator of learning through a range of learner-led interventions</li> <li>• Will support line managers</li> <li>• Will research and implement new learning methods and programmes, including the use of technological solutions</li> <li>• Alongside Partnership Learning and OD professionals ensure robust quality assurance measures to demonstrate that learning opportunities are appropriate and relevant, delivering improved outcomes and performance for both individual and the Partnership.</li> <li>• Will actively seek opportunities to expand and develop OD and learning initiatives and liaise with external professionals to support collaborative learning opportunities</li> </ul>

Table 1

## **Chapter 5: Way forward for Organisational Development in Perth & Kinross**

### **Ensuring our workforce is core to making change a reality**

Discussion across the teams will prove invaluable in ascertaining the Learning & Organisational Development needs of the partnership workforce and its community partners. Our people are our greatest asset and it is through their talents and ambitions that real improvements in services and outcomes will continue to be made. We have confident, ambitious, innovative staff and are proud of their achievements. The next step is to build upon their successes. We will continue to promote and nurture positive culture and behaviours and encourage integrated working, based on a common purpose, to deliver the best possible outcomes for our communities. We will also continue to create space and opportunities for our people to offer their best, in service of the communities of Perth and Kinross.

Our Joint Organisational & Workforce Development Plan seeks to support our workforce, individuals and communities that we work with in three ways;

- Provision of accessible information as well as raising awareness, understanding and participation around integrated working
- Providing access across our Health & Social Care workforce to joint learning programmes
- Future enhancement to specific OD and Learning opportunities which are focused on supporting Health & Social Care Integration across the wider partnership.

### **Developing Capabilities**

The Partnership recognises the importance of developing the capability of managers and staff. Professional Supervision and Appraisal processes relevant to each partner organisation, will include discussion about personal development needs necessary to improve performance in existing roles and, to support future progression. There will be a focus on statutory and mandatory training to ensure that our workforce is equipped to provide high quality services to the people they support but also, around developing different ways of working within communities. This will ensure that we consistently deliver creative support solutions for the people we work with.

We will ensure that jointly agreed core competencies are built upon throughout the development of the Partnership and will continue to support the development of our joint performance and quality assurance framework.

### **Leadership and professional development**

Inherent in future service delivery and workforce capability across the organisation and the communities we support is the development of leadership capability. As a Partnership, we will ensure that Organisational Development and Learning & Development activity is taken forward in a cohesive and joined up way. The following elements will be crucial:

- **Integrated Joint Board level** development will anticipate the capability and skills necessary to operate effectively as a joint Partnership Board and will require a focus on key activities including development around:
  - Strategic thinking
  - Decision-making
  - Analysis and the use of information
  - Communication
  - Interaction with others
  - Achievement of results

**Senior leadership** development will recognise the importance of empowering managers and staff across the organisations within the Partnership to develop and deliver services in accordance with overarching values and principles outlined in this document.

A programme of activity will be developed to promote joint working between the Partnership organisations building upon clear roles and accountabilities and will seek to develop core management skills associated with working across professional boundaries and localities. Communities will remain a key partner in this activity to ensure flexibility, appropriateness and individualism is encouraged and maintained.

**Operational leadership and management** will require further enhancement to support local leadership and management capability. Locality working will support the development of this and will also highlight gaps in knowledge, skill and capacity. However, the implications of workforce restructuring as a result of the future development of localities, will place a significant demand on them necessitating the need to develop the core management skills for our operational managers. Areas to be considered are:

- Change management, leadership behaviours and innovation
- Financial management and business planning
- Performance review, professional supervision and staff appraisal skills
- Staff management (sickness, capability)
- Communication, presentation and report writing skills
- Interviewing (recruitment, performance, complaints, appraisal)

A separate set of more specific competencies will be identified for support functions as we begin to work within localities and the communities we support to enable us to develop new ways of working. Areas for development will be around:

- Influencing & negotiation skills
- Conflict resolution/mediation skills
- Project management methodology and delivery techniques
- Continuous improvement and quality monitoring techniques and processes

Organisational Development cannot work in isolation to the ongoing Learning and development requirements of the workforce. Therefore, L&D activities are critical enablers for enhancing productivity and organisational performance. The adoption of learning and development activity/planning will not only create organisational and

personal effectiveness but will provide a foundation for growth in difficult and challenging times within the workplace. It is critical that in defining the approach to managing our organisational and Learning & Development needs across the partnership that we:

- **Align and integrate** identified learning and development interventions with partnership business objectives and the underpinning plans which support these
- Ensure that our collective **culture** supports these initiatives and addresses barriers to learning
- Enable our **managers** to invest in, and be accountable for, learning and development both for themselves, their staff and partnership colleagues
- Focus on the **application** of learning rather than format, and consider appropriate learning options which enable our staff to fully engage with the ethos of learning within professional practice in a productive and constructive way
- Continually **evaluate** learning and development formally, systematically and rigorously to maintain relevance and appropriateness to organisational aims and objectives

As part of a “Toolbox for Learning” interventions will be utilised, to support our workforce, to enable change across localities. These are:

#### **On the job**

- On-the-job learning with projects that stretch staff
- Coaching by supervisors, peers and other staff at all levels
- Shared information and discipline knowledge across staff meetings
- Awareness raising events and informal discussions at work ‘in the passing’
- Formation of partnership ‘knowledge networks’ or communities of learning
- Participating in steering groups, committees or working groups
- Involving service users and carers to shape and influence new ways of working
- Team-building events
- Mentoring programmes – formal and informal
- Reading, internet research
- Multi-disciplinary rotations, secondment and acting up opportunities

#### **Formal learning opportunities**

- Further & Higher Education courses and Distance Learning
- Accredited courses and Partnership wide in-house training
- Leadership programmes
- Seminars, forums & conferences
- Work-based projects
- Blending of elements of formal and on-the-job training
- Online partnership wide interactive tutorials

#### **Professional and community**

- Membership of professional and community bodies and
- Ongoing review and refreshment of professional skills
- Building and taking part in professional networks
- Maintaining CPD to fulfil professional registration requirements
- Reflective practice and ensuring regular feedback mechanisms

## **Implementing the Strategy**

### Performance Monitoring

An OD Short life working Group has been established to ensure representative views from across services and workstreams are fed back into future development of provision and the effective monitoring of this strategy.

The OD Strategy Action Plan attached (Appendix 1) will be monitored quarterly by the OD leads across the partnership and will be reviewed annually with the OD SLWG Group. Training provision and OD activity will be evaluated against stated objectives and joint competencies as it is delivered and fed back into the annual review process.

