

Agenda for Change

Lessons from Early Implementation

Agenda for Change – Lessons from Early Implementation

1. Introduction

- 1.1 How do you implement a new pay scheme for the third largest and probably most complex organisation in the world? How do you streamline an archaic pay system that doesn't meet Equal Pay legislation, does not allow new roles to be fairly rewarded and offers little opportunity for career and pay progression?
- 1.2 Fortunately it has proved possible and through a lot of determination, blood, sweat and tears we are on the brink of implementing Agenda for Change within Early Implementer Sites (EI). For the vast majority of us we have that pleasure to come, providing the final deal is accepted through a number of second ballots. However, the Early Implementer sites have been hard at it for the last ten/twelve months and have learned many lessons along the way.
- 1.3 The purpose of this paper is to share some of those lessons with all in London SHRINE and indeed the whole country. We are fortunate in London in having two EI sites, South West London and St George's Mental Health NHS Trust and Guy's and St Thomas' Hospitals NHS Trust. The Agenda for Change teams within those two organisations have kindly and generously given their time in talking about their experiences and the learning points for them and their organisations. It is hoped these learning points will be invaluable in implementing Agenda for Change in your own organisations. Of course we can't cover everything in this document and we strongly recommend that you look at the information contained on the Agenda for Change and Modernisation Agency websites.
- 1.4 Of course, at the time of writing we are awaiting a second ballot from a number of Trade Unions. The results of those ballots are likely to be available in September and then we will know if Agenda for Change will be implemented.
- 1.5 In the meantime there is much to take on board and a lot of preparation that can be undertaken. Whilst Trade Unions are keen to await the result of the second ballots they recognise that learning must be circulated and certain preparations can take place. The recently published 'joint statement' from the shadow NHS Staff Council details what work Trusts can undertake before the second ballot results are known.
- 1.6 Finally, before we begin to look at specific details, a word about SHRINE networks. These were established almost five years ago largely in anticipation of the need for organisations to network and share intelligence on Agenda for Change. Now that Agenda for Change has become a reality we have well established networks that are ideally placed to support its members. If you have any suggestions, requests for information or wish to share your

organisation's work with other organisations please contact your NHSP provider (details in appendix 1).

2. The Learning

2.1 This main section of the paper is divided into sub-sections that correspond to some of the typical work-streams of the implementation project plan for Agenda for Change within the EI sites. This is typical rather than universal but is a useful way to look at what has gone on in EI sites.

2.2 **Job Evaluation** – It was almost inevitable that we should start here! This is the area that most discussions on Agenda for Change have focussed on and probably because it involves large numbers of people who need to be trained and organised as well as job descriptions for all posts that need to be accurate and agreed.

2.2.1 If we start with job descriptions, we know that many organisations, not just EI sites, have been busy updating job descriptions. This could obviously be a huge task for any organisation but there are a number of ways in which to reduce the burden. Firstly, don't change them for the sake of it! Many job descriptions will be in a suitable format as well as being up to date and EI sites have learned that it's not a good use of time trying to fine tune adequate job descriptions. Secondly, generic job descriptions may be a possibility for certain staff groups. If a significant number of people are performing very similar jobs it may be possible to agree a generic job description for them all. This not only saves time in preparing job descriptions but may also greatly reduce work at the matching/job evaluation stage. Whatever approach you take the final job description must be agreed between the individual(s) and the relevant line manager.

2.2.2 Much has been said about the format of the job description and there have been many calls for a national template. However, no such template exists as that may have led to virtually all job descriptions, regardless of whether they are up to date, being re-written in line with that new format. There have also been calls for job descriptions to be written in the format of the factors of either the job evaluation handbook or the knowledge and skills framework. Whilst this may appear to be beneficial there are very good reasons for not doing this and the Department of Health has been very keen to discourage this. Apart from the work that this would generate for all organisations it would confuse the purpose of a job description, namely to describe the duties of role, and could lead to a host of significant problems. EI sites have been happy to take on board the DoH's advice. Instead, organisations have been left to follow their own guidance on writing job descriptions. NHSP has produced a useful short paper on the subject and a copy can be obtained from your local SHRINE provider (see appendix 1). Whatever format and methodology is used the important issue is that the job description that is submitted for matching is agreed between the individual and line manager. This may also have involved staff side representation if deemed necessary by either party.

- 2.2.3 There is a heavy administrative and logistical burden for organisations undertaking job evaluation. The clear lesson from EI sites that money spent on excellent administrative support is money well spent and therefore appointing/recruiting the right person is essential. Ensuring that JE/Matching panels are correctly constituted (staff side and management), have all the necessary facilities and documentation is crucial for the process. Panels of between 3 and 5 people (usually 4) need space and quiet to carry out their matching/JE duties. It is not uncommon for a member of a panel to become unavailable for a panel at short notice. This potentially scuppers the panel unless a replacement can be found and contingencies are not easy to find. Rooms for matching panels that are free from disturbances and are comfortable enough for people to spend all day sitting down and studying job descriptions are highly desirable. People need to be fed and watered and have nearby toilet facilities. This may sound obvious but the more smooth that the running of JE/matching is, the more effective they become and the more jobs they can match. The results of JE also need to be stored and EIs have learned that somebody in the team needs to have a good knowledge of databases. However, it is possible that databases will be made available to Trusts thus avoiding the need for everybody to develop their own.
- 2.2.4 Panels often require further information than that contained on the job description and consequently are provided with a telephone. Panels can then contact the relevant individual and/or manager and obtain the necessary clarification. In some EI sites it has been possible for staff to ‘pop down’ to see the panel but in many organisations particularly Mental Health trusts and PCTs this may not be an option for large numbers of staff.
- 2.2.5 Before JE panels can be convened the necessary people need to be trained. For roll-out of Agenda for Change, Strategic Health Authorities (SHAs) have arranged for a number of train-the-trainer events to take place. The people completing this training will then be able to train colleagues within their own organisations to carry out JE or matching. Only officially trained trainers can deliver the training and officially trained matchers/evaluators can carry out matching or evaluation.
- 2.2.6 Process of matching – Set out below is schematic of the matching/evaluation process followed by an explanation of the various stages:-

Job Description – Prepared, agreed and submitted



Panel of trained matchers assembled



Match against national job profile



If yes, salary determined



If no, Job Analysis Questionnaire (JAQ) prepared, agreed and submitted



JAQ 'tested' by analysts for accuracy and amended



JAQ submitted for evaluation by trained panel



Points awarded and pay band determined

- 2.2.7 The first two stages of the process have been explained in earlier paragraphs. The stage involving the actual matching process involves a panel of between 3 and 5 members (all trained). Most EI sites have been working with panels of four involving two staff side and two management representatives. Experience has shown that which 'side' someone has come from is largely irrelevant as it is their training that dictates their decisions/views rather than their staff side or management perspective.
- 2.2.8 Many EIs have encountered difficulties in securing sufficient staff side representation for matching panels. Much has been done to try and increase trade union membership and attract more representatives. This is explored in more detail in the 'Partnership' section however one trust has reached an agreement that panels for matching can be made up of three representatives with only one staff side person present.
- 2.2.9 The panel attempts to 'match' the job description against a national profile using the national job evaluation handbook as its main guide. Out of the sixteen factors that are included in the handbook and that are relevant to all jobs covered by the Agenda for Change agreement it is necessary to match exactly factors number 2 (Knowledge and Education) and 12 (Freedom to Act). If these do not match then an overall match is not possible and another national profile must be sought or a JAQ must be completed for full JE purposes. If those two do match then the panel can proceed with the remaining 14 factors. With these 14 it is permissible to have a maximum of 4 variations of plus or minus 1 from the level described in the national profile. If that is the case then a match has been achieved and assimilation onto the national pay scale can take place. If not, then a JAQ needs to be completed and put through the full JE process.
- 2.2.10 Most EI sites have managed to average about 4-6 jobs per day through matching. This figure has increased as panels have become more proficient. However, panels tend to be only as quick as the weakest link and this can slow down the process. A major learning point for roll out is that organisations should 'practice' matching panels. This will help with developing common understanding and efficiency for when matching takes place for real – second ballot pending!
- 2.2.11 There is a strong feeling amongst some EI sites that it has been too easy for a post to be not 'matchable'. Every effort should be made to see if a post can match a national profile as the full JE process is far lengthier. For roll out, organisations will benefit by having more national profiles as the library of these is continually growing (See Agenda for Change website). However, job

descriptions can be legitimately reviewed and agreed in such a way as to enable a match to take place.

- 2.2.12 At present many EI sites are reporting that approximately 60% of their jobs will be matchable against national profiles. This figure has been growing recently partly due to more national profiles being available but partly due to organisations putting more effort into obtaining a match. For most of us in roll out this figure will be higher although it should not be assumed that it will be significantly so unless organisations approach the whole issue of job evaluation in a robust manner.
- 2.2.13 If no match is forthcoming then a JAQ has to be completed. This is a 30+ page document that can take a number of hours to be completed. It needs to be done by the jobholder and the relevant manager and both may need guidance despite the form being reasonably self-explanatory. Despite this the information that is submitted to analysts for 'testing' often needs to be developed. Consequently, the more effective the guidance that people receive the more robust the outcomes will be on the JAQ and significant amounts of time could be saved.
- 2.2.14 Once a JAQ has been analysed and appropriate amendments made it can be submitted to a Job Evaluation panel. The panel will award a score against all 16 factors in the national handbook to give a total points score which will determine the pay band for that post.
- 2.2.15 The whole process of full job evaluation is considerably longer than the matching process. The completion and checking of the forms takes more time and the panels have typically been able to evaluate one or two posts per day. The less JE the better has been the message coming from all people in EI sites.
- 2.2.16 However, many people believe that their job is different to that of others and are convinced that those differences can only be appreciated by going through full job evaluation. Obviously, the more people you can convince otherwise the better and much of that is down to communication, which we will look at later.
- 2.2.17 The prospect of being involved in implementing a new pay scheme has been attractive to many people. Most people see that involvement as being through matching/job evaluation and the process certainly does require staff from across the organisation to be involved. Human Resources departments will not be able to implement Agenda for Change without significant numbers of staff coming forward to participate in matching/job evaluation. The diversity of people involved certainly adds considerable value to the project and assists with communication. However, gaining cover for people whilst they are involved in matching/job evaluation can be problematic as well as expensive. Some of the people who have been involved in EI sites have 'rare' skills and experience and it has not always been possible to find a replacement. This has had a profound influence on service delivery. Some EI sites have found this to be particularly true of staff from Allied Health Professions groups. The impact

on service delivery can be reduced if lengthy notice can be given of staff involvement in panels.

- 2.2.18 Determining job families or clustering has proved to be one way of reducing time spent on matching. Clusters of jobs need to be agreed in partnership with staff and their representatives that those jobs are essentially the same or extremely similar jobs. In this way it is hoped that matching panels can evaluate one job out of the family and if it matches a national profile then all of the jobs within the cluster may be matched. The panels need to have an advisor who is readily available to answer questions and who has familiarisation with the language used. In this way reports to staff can contain language that is meaningful to them to which they can relate, thus reducing the number of subsequent appeals.
- 2.2.19 Some EI sites have found it useful to hold evaluation meetings or debriefings with matchers. This has helped embed critical learning for matchers as well as providing invaluable information for project leads. It has been known for panels to get it wrong so the review and evaluation process is essential
- 2.2.20 Some effort has also been put into monitoring and particularly in relation to ethnic origin. Some EI sites have been keen to establish whether there have been any adverse impacts on ethnic minorities. As yet none has been found but it is important to be sure of the fairness of the JE/matching processes and is probably required by the provisions of Racial Equality Schemes.

2.3 Partnership Working – Much of the implementation of Agenda for Change requires the acquisition of new knowledge as well as the development of new skills. However, for many organisations it requires a change in behaviour in the form of partnership working. This section explores what that has meant to EI sites as well as some of the underpinning philosophy behind partnership working.

2.3.1 Partnership working involves a movement away from the type of industrial relations that has been in place in many NHS organisations. The lessons from many organisations are that partnership working has the following benefits:-

- Helps employers achieve sustained business success through improved workplace morale and performance
- Ensures the success of organisational change by ensuring that it is built on the involvement and participation of the workforce
- Helps unions play an active role in developing an organisation's strategy
- Improves union membership and organisation in the workplace

2.3.2 In terms of Agenda for Change, partnership working has certainly helped increase trade union membership and importantly the number of accredited representatives. Recruitment campaigns have been carried out in partnership with a number of trade unions that have proved to be successful. The larger unions such as RCN and UNISON have been particularly active in campaigns

as well as putting forward representatives to be involved in implementing the various workstreams. However, smaller unions need to be supported with their recruitment campaigns. They also need support for their representatives in ensuring they are afforded appropriate time off from normal duties to allow them to get involved as well.

2.3.3 Partnership working in EI sites has been in evidence throughout implementation. From the very outset staff side representatives have been involved in agreeing strategies and plans for implementation with senior management. Those plans and strategies have then needed to be implemented and a number of workstreams have been developed. Those workstreams have often had a staff side and management lead and in any case the implementation is carried out in partnership. Many staff side colleagues are leading those workstreams and this sends a powerful and positive message to staff that Agenda for Change is not a management initiative imposed upon staff.

2.3.4 This level of staff involvement also encourages and facilitates the involvement of staff at a more local level. EI sites have been keen to demonstrate such staff involvement to support the achievement of the various benefits of Agenda for Change for staff and the organisation. It is clear that many of the modernisation benefits that can arise from Agenda for Change can be more readily realised if there is staff involvement at a local level. Many of those benefits are linked to effective use of the Knowledge and Skills Framework (KSF) which we will look at later.

2.3.5 The lesson from EI sites seems to be that the case for partnership working has been successfully made. In terms of making it happen in reality a number of principles have been taken on board:-

- Commitment to success of the enterprise
- Recognising legitimate interests
- Commitment to employment security
- Focus on the quality of working life
- Transparency
- Win-win approach

2.3.6 Following all of the above has presented challenges to many EI sites. Progress has been slow in some areas as individuals take time to adjust to a new method of industrial relations and staff involvement. The progress has not always been sustained with the occasional lapse into the 'old ways' and staff side and management have had to work together to get projects back on track and working in partnership.

2.3.7 What seems to underpin all partnership working and helps address problems and lapses when they occur is trust. Many EI sites have worked hard to achieve this level of trust because it was not in place before. This is often due to the previous model of industrial relations not requiring trust to any great degree. When issues have been discussed between management and staff side

they have often been done in a relatively adversarial manner. They have also been largely concerned with conflict resolution.

- 2.3.8 The issue of transparency is a major contributor to developing trust with both 'sides' being prepared to share information. This encourages a more open discussion that helps management and staff side understand each others position and their respective legitimate interests. This transparency and understanding of each others position allows organisations to more effectively explore this concept of 'win-win'. Whilst this may not always be possible and a compromise may be necessary EI sites have recognised that this is the preferred approach. One staff side chair, who enjoyed a good working relationship with his HR Director, felt that a lot of the success of partnership working was down to personalities. He went on to say that both 'sides' had to genuinely listen and be constructive in their dialogue. He also emphasised the need to engage and use all staff trade union representatives and not just the 'usual suspects'. However, he warned that there are people who want to see Agenda for Change fail
- 2.3.9 The involvement of staff side representatives in all stages of implementation raises issues of both capacity and capability. We have looked at recruitment campaigns to secure more accredited representatives but many EI sites have adopted another method of increasing capacity. Accrediting trade union representatives specifically and solely for Agenda for Change implementation has been a popular method amongst EI sites. Trade unions have been willing to adopt this approach and it has been successful in easing the pressure on organisations to implement in partnership. There is also an eagerness on the part of many staff side colleagues to continue partnership working in relations to service modernisation issues.
- 2.3.10 A number of organisations across the country have been considering working with non-trade union representatives to implement Agenda for Change. This is usually as a result of trade union membership being very low within their organisations and a subsequent lack of accredited trade union representatives. It will be interesting to monitor this situation as it goes against the grain of staff involvement in Agenda for Change. From the outset of discussions at a national level on the design of the pay deal the modus operandi has been trade union representatives working in partnership with management. To not maintain that very strong theme may cause organisations difficulties.
- 2.3.11 In terms of capability of staff side representatives it is important to recognise the support that some people may require. Trade unions and the Modernisation Agency have provided workshops and training for people involved in implementation which has been well received. Trusts should also consider providing development opportunities for staff side representatives to deal with more individual needs.
- 2.3.12 Investment in partnership working and the capacity and capability is clearly necessary for the successful implementation of Agenda for Change. It is clear that investment will also provide rewards in other areas. The Practice Plus stage of Improving Working Lives will need to be implemented in partnership

and organisations will need to clearly demonstrate how trade unions have been involved. Indeed, a strong case can be made for partnership working becoming the accepted NHS way of conducting industrial relations. The Department of Health is clearly keen to promote that and organisations will be 'encouraged' to adopt a partnership approach.

- 2.3.13 Staff side colleagues from EI sites have admitted to a number of challenges that have not been easy. Firstly, the joint working has proved problematic. Previous contact with management used to be on an advisory basis in some organisations and then progressed to consultation. However, the transition to joint working has not been easy. One staff side colleague sees the need to avoid politics as essential. Personal agendas and political views need to be put aside in terms of implementation and this has not always been easy to do. Consequently, our staff side colleague advises other staff side colleagues to remain open-minded and not be guided by dogma. Staff side colleagues who are delivering project streams should also prepare themselves for accusations, mostly friendly, of being management or a HR manager.

2.4 Knowledge and Skills Framework (KSF)

- 2.4.1 At the early and mid stages of implementing Agenda for Change many EI sites were reporting a relative lack of progress on the KSF. There were a number of reasons for this but it was mainly due to a lack of capacity of both the project team and line managers. Significant progress has been made lately and some of that is set out below.
- 2.4.2 The implementation of the KSF is not easy for reasons which we will see in the following section EI sites have learned that implementation is significantly easier if you have robust appraisal processes already in place. Whilst there has been a requirement for all staff to have a PDP and appraisal as part of IWL it is clear from many organisations that coverage is not universal and there are varying degrees of sophistication for appraisal systems. The KSF is a highly sophisticated appraisal process and there are a number of important resulting implications for organisations.

2.4.3

Gateways
Foundation KSF
Links to CWP
Impact on appraisal
Skills for line managers
Pay drift
Productivity
Pilot sites
Policy for roll out
Links to CPD
More focussed T&D opportunities

Clearer picture of staff resources – skills audit
Time consuming
Get teams to discuss it amongst themselves
Gateways can be problematic if appraisal system is used punitively – must be used developmentally
Managers must have options available to them in dealing with problems that relate to KSF and gateways
Heavy use of resources for KSF training
Needs a learning/supporting culture

2.5 Terms and Conditions

2.5.1 Agenda for Change may be a national agreement but there are significant elements that allow for and require local agreement. This section looks at some of those areas and the issues that have arisen.

2.5.2 We will look at some of the specific areas for local negotiation later on but first we will address a general issue. As local agreement is required it is necessary for management and staff side to negotiate. This is sometimes a test for partnership working as it's often a different style that encourages different behaviour from management and staff side that is more akin to traditional industrial relations models. It was important to limit the effect of these negotiations and not allow them to spill over into other areas where partnership working was taking place. On some locally determined terms and conditions there was a tendency for agreements not to be reached until neighbouring Trusts had reached agreement as unions were keen to get a good deal.

2.5.3 One of the first tasks for EI sites was to confirm existing terms and conditions for all staff. Consequently, a personal check sheet was sent to all staff for them to confirm or amend their details.

2.5.4 A large amount of information is required to deal with the Terms and Conditions issues including:-

- Finance data
- HR Data including personnel records
- Payroll data
- Work patterns
- Labour market data
- Assimilation data – planning and agreeing transition to new arrangements
- Operational implications

2.5.5 One EI site had involved the Chief Nurse from the outset in this area. This had proved to be very useful in terms of that person's knowledge and understanding as well as demonstrating to a major staff group that their issues were being addressed.

2.5.6 This area of work required a number of agreements including:-

- Developing new contract documentation
- Agreeing out of hours/unsocial hours payments – this had proven to be particularly difficult in a number of EI sites.
- Recruitment and retention premia (sometimes a separate group)
- Determine reference periods
- Agreeing a review process
- Delegated decision-making powers

2.5.7 The team who are dealing with terms and conditions require a number of things:-

- Administrative support
- Detailed technical understanding of terms and conditions.
- Experience staff side representatives and service managers.
- Freedom to take decisions
- Long term ‘visioning’ of service developments
- The team needs to be broad based with representation from the major staff groups.

2.5.8 It has proved to be effective to take a policy approach on certain terms and conditions issues. A policy on starting salaries had proved to be particularly useful in ensuring equality and fairness. Certain examples of policies could be found on the Agenda for Change website.

2.5.9 In relation to on-call, one site had reported it had been identified that some pharmacists received additional spine points as compensation for that work rather than separate payments.

2.5.10 In some areas Healthcare Assistants were receiving less London Weighting as a result of the new formula. However, as their total package has not been adversely affected no protection was necessary. Despite this, effort needed to be made in communicating this to the staff affected to avoid unnecessary concern. Generally, there was a need to make people aware of the potential for losses on certain terms and conditions but that no one will lose overall.

2.6 Project Management

2.6.1 There have been variations in terms of who project manages the implementation of Agenda for Change. In some EI sites there has been a designated project manager whilst others have asked an existing member of staff to fulfil the role. Many organisations are now advertising for project managers to deliver Agenda for Change and in some cases to deliver other major HR initiatives e.g. Consultant Contract and GMS contract.

2.6.2 Whatever approach is taken it is clear from a number of EI sites that investment in project management is a sound investment. Many issues have been envisaged and proactively dealt with because of this investment.

2.6.3 The various sub-headings in this paper give an indication as to how the project has typically been organised and we have already mentioned the fact that each

aspect will need to be delivered in partnership. Some comments have been made about HR's capacity in relation to project management skills. It may be true that HR is not typically in the business of project management, however, there will be an increased need for such skills as we approach implementation of initiatives such as ESR.

- 2.6.4 The amount of work that is involved in delivering Agenda for Change is obviously considerable. In terms of project management many EI sites feel as though the implementation process consists of a number of relatively easily identifiable and discrete project streams. This has made it easier to identify the key stages involved and the necessary resources.

2.7 Payroll/IT

- 2.7.1 A technical working group had been established in many EI sites involving representatives from Finance, HR and Payroll. In some sites the Nursing Directorate had also been represented as they needed greater involvement in the early preparation of some of the financial information.

- 2.7.2 The process of assimilation places a great deal of pressure on payroll clerks. This may not be apparent in the early stages of implementation but becomes much more so as progress is made. This is a vital staff group for implementation and as mentioned previously there have been a number concerns from staff over the national profiles for Payroll. Consequently, effort needs to be made to explain issues to the Payroll team to alleviate their concerns and to prevent an increase in turnover of staff at a time when their retention is paramount.

- 2.7.3 One EI site was of the opinion that as Agenda for Change is a relatively less complex pay system it should translate into savings for payroll. This had yet to be confirmed but if so that EI site intended to channel those savings into the implementation of the Electronic Staff Record (ESR).

- 2.7.4 Difficulties had been reported in relation to the support offered by existing payroll providers. However, one EI site who used Rebus found that the service provided continued to be of a good standard with few problems being encountered.

- 2.7.5 The same EI site had invested in the development of a database tailored to their specific needs. The database was designed to reduce the amount of inputting from payroll clerks and proved to be critical.

2.8 Service Modernisation

- 2.8.1 This is an area which many sites are keen to make significant progress. They recognise the need and requirement to obtain improvements in productivity through pay modernisation and to avoid it being a cost pressure. However, most sites felt that it was difficult to focus on this issue during implementation for a number of reasons.

- 2.8.2 Firstly, most EI sites saw the key players in terms of realising service modernisation benefits as being the line managers. It has been necessary to engage with those managers in terms of education and training on modernisation issues and to develop their understanding of how Agenda for Change could assist them in ensuring delivery of more effective services. During implementation, however, line managers were heavily involved in issues such as preparing job descriptions or agreeing JAQs as well as communicating with staff on progress with implementation. Consequently, the modernisation issues often had to wait until line managers simply had more time.
- 2.8.3 The work of the Changing Workforce Programme (CWP) has assisted many organisations, not just EI sites, in modernising roles and services. The tools and techniques adopted by the CWP can be obtained via their website http://www.modernnhs.nhs.uk/scripts/default.asp?site_id=65 .
- 2.8.4 One of the key drivers for assisting organisations in realising modernisation benefits from Agenda for Change will be the Knowledge and Skills Framework. We will look at that in more detail later on but use of the KSF will allow organisations and managers to understand the skills, knowledge and behaviour of staff that contribute to healthcare services. It will facilitate staff acquiring new skills and for them to be rewarded for that but in a way that should ensure that service delivery is enhanced.
- 2.8.5 It is important that partnership working and staff involvement are maintained in service modernisation issues. Trade Union representatives should be involved in organisation-wide discussions but it is vital that staff involvement takes place at a local level. This is a theme identified in the NHS Plan and forms a fundamental aspect to the work of the CWP.
- 2.8.6 It is clear from EI sites that view Agenda for Change as a potential cost pressure and that the KSF and the work advocated by the CWP are critical contributors to the push for greater productivity.

2.9 Communications

- 2.9.1 There is no doubt that for many people Agenda for Change is seen as an opportunity for a pay rise. A number of staff groups have, for a number of years, felt that they were insufficiently rewarded and that the new pay deal represented a way of redressing the perceived imbalance. Consequently, EI sites have been acutely aware of the levels of expectations within their organisations and the need for effective communication. This has led to a number of EI sites considering this aspect of implementation as the most important.
- 2.9.2 A variety of communication methods have been adopted, which will be explored in more detail later, but the lesson appears to be that it is more effective to go to staff rather than them coming to you. That has obviously

proved to be more difficult with multi-site organisations such as Mental Health Trusts and PCTs. The feedback from staff has clearly indicated that this approach sends powerful and positive message. It has also proved to be a more effective method of communicating some of the critical messages.

- 2.9.3 Staff have a particular interest in the outcomes of job evaluation or matching although they don't always have as much interest in the process itself. EI sites have spent significant amounts of time explaining the process to staff. The robustness of system has been explained so that staff have more confidence in the outcomes and are therefore less likely to have doubts over the results. EI sites have put considerable effort into this as it is seen as a major way of reducing the number of appeals.
- 2.9.4 There have been concerns from certain staff groups about potential adverse effects on their salaries. In London, Admin and Clerical have been particularly worried. This is partly due to the historical grade drift that has taken place and caused by employers having to pay more than national rates in order to recruit and retain in London. The concern of these staff is that by going through matching or job evaluation they will be assimilated onto the new pay scale at a lower rate. EI sites in London have been eager to offer reassurances to these staff by pointing out that protection is available and recruitment and retention premia may be payable. Staff have also been advised to not be overly influenced by some national profiles. Payroll clerks were particularly uncomfortable when they saw the national profile for payroll clerk at band 2 and some of the above assurances had to be given to those staff. This staff group is particularly important to keep happy wherever possible as they play a key part in implementation.
- 2.9.5 Agenda for Change, as with many HR based initiatives, is full to the rafters with jargon. This has created barriers to understanding and doubt in the minds of many staff. Consequently, many EI sites quickly learnt that in order to prevent those misunderstandings and doubt becoming ingrained in staff they needed to explain many of the phrases and terminology associated with Agenda for Change. 'Jargon-busting' events have been held either as stand alone events or as part of other sessions where these issues can be addressed and the feedback has been positive from staff. Implementation teams have also felt that these sessions prevent issues snowballing and leading to appeals and disputes.
- 2.9.6 The messages communicated to staff or the feedback sought from staff are always more effective when they are visibly done in partnership with staff side representatives. In many EI sites there has been a heavy involvement of staff side representatives in communications particularly in the early stages of implementation. **However staff side are involved in the actual delivery of communication events it's critical that they be equally involved in the development and agreement of the overall communications approach.**
- 2.9.7 In some EI sites there has been a significant part of the workforce whose first language is not English. Consequently, many of the sessions that have been held have not met the needs of these staff and there has been a need to run

separate events and sometimes involving an interpreter. This again has not only been extremely useful in dealing with issues but has sent a very powerful and positive message to all staff.

- 2.9.8 Assimilation has proven to be more problematic than anticipated and EI sites have generally not made the progress on this that they had wished. The EI sites have learnt though that after each major assimilation exercise it is important to hold communication events to help deal with issues arising from that exercise. Even if excellent communication has taken place prior to assimilation problems do arise and staff do have questions and it's therefore important to be available to deal with those issues.
- 2.9.9 A number of EI sites had learned a painful lesson in terms of maintaining a constant or steady stream of communications with staff. They had begun well in terms of communications with good feedback on their events only then for there to be a lull in those communications. The organisations themselves felt as though they hadn't really got anything significant to communicate to staff but the perceived silence created some discomfort amongst staff and a sense of being kept in the dark. The organisations then spent some time trying to deal with the resulting anxieties in order to get back on track.
- 2.9.10 A variety of communication methods have been adopted by EI sites including roadshows, newsletters, pay clinics briefings and websites. One EI site had developed a web based excel spreadsheet for the calculation of annual leave. It had proven to be user friendly for managers and had reduced the number of enquiries for the HR Department who had previously received numerous calls. Clinics and roadshows had been held after particularly important stages of implementation and it was felt to be very important to have evaluation sheets completed by those attending. This allowed the Agenda for Change teams to assess the level of understanding amongst people and to make appropriate changes to the programme.
- 2.9.11 Many people within EI sites approached Agenda for Change in largely rational way. Once they had received relevant information and understood what was going to happen they were comfortable with the process. However, some people did not approach it in that fashion and took the whole process in a very personal way. Where some staff felt they were being disadvantaged by Agenda for Change they felt that it was a reflection on their own performance. Whilst further explanation of the process often helped alleviate this feeling it was important to recognise the emotional side to the new pay system for some staff.

3. Summary

- 3.1 It is hoped that the above sections have provided useful information on the implementation of Agenda for Change. As stated in the opening paragraphs this is not an exhaustive document and there is much more useful and relevant

information. The Agenda for Change and Modernisation Agency websites are two places where useful information can be accessed. Organisations should also use their SHRINE networks to gather and disseminate information.

- 3.2 As roll out takes place, subject to the second ballot, much more information will become available. It will be of huge benefit to the NHS if organisations can liaise with each other and share their learning. Strategic Health Authorities, Best Practice Facilitators and SHRINE networks all have a role to play in this sharing of information and organisations should work with these stakeholders for the benefit of all.

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