

Reference Number: UHB 025  
Version Number: 3  
Approved By: UHB Board

Approval Date: 29 July 2021  
Next Review Date: 29 July 2024

# Partnership & Recognition Agreement



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CYMRU  
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Bwrdd Iechyd Prifysgol  
Caerdydd a'r Fro  
Cardiff and Vale  
University Health Board

## Cardiff And Vale University Local Health Board **Partnership & Recognition Agreement**

The Cardiff and Vale University Local Health Board (the UHB) is committed to working in partnership with recognised Trade Unions and Professional Staff Organisations.

The UHB will negotiate and discuss strategic issues with staff representatives and involve them in the decision making process to shape the Health Board's services.

Representatives and managers are required to work collaboratively for the benefit of staff, patients, visitors, relatives and the Health Board.

Charles Janczewski  
**Chair**

Len Richards  
**Chief Executive**

Dawn Ward  
**Chair of Staff Representatives**

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## 01 Introduction

The Health Board is committed to the partnership agenda with its employees to ensure that they can be involved in the decisions that affect them and the services they provide for patients.

The Health Board objective of delivering the highest quality services possible can only be achieved by a workforce that is sufficiently skilled, committed and feels valued. This agreement is intended to help further embed partnership working within the culture and practice of the organisation at all levels.

The Health Board will ensure that managers are committed to an open and participative working style by being honest, open and fair in their relationships with staff. Managers will demonstrate this through their own behaviour and the behaviour they expect from their staff.

## 02 Principles of Partnership Working

To deliver partnership working successfully, it is important to develop good formal and informal working relations that build trust and share responsibility, whilst respecting difference.

It is a principle of the UHB that all our staff and their representatives are involved at every level in matters affecting their jobs and working lives. This involvement should be at the earliest opportunity, prior to decisions being made.

To facilitate effective partnership working, all parties will commit to adopt the following principles in their dealings with one another:

- Building trust and mutual respect for each other's roles and responsibilities;
- Openness, honesty and transparency
- Top level commitment
- A positive and constructive approach
- Commitment to work and learn from each other
- Early discussion on emerging issues and maintaining dialogue on policy and priorities
- Commitment to ensuring high quality outcomes for service users
- Making the best of available resources
- Ensuring a 'no surprises' culture is maintained.

Working together on a basis of co-operation, openness and mutual trust is acknowledged by both the UHB and Trade Unions to be the best way to enhance the ability of the UHB to adapt to changing circumstances and financial constraints and to ensure the future success of the Health Board in the delivery of high quality patient services and our strategy Shaping Our Future Wellbeing.

The UHB's approach to partnership working is underpinned by our agreed values and behaviours:

We care about the people we serve and the people we work with	Treat people as you would like to be treated and always with compassion
We trust and respect one another	Look for feedback from others on how you are doing and strive for better ways of doing things
We take personal responsibility	Be enthusiastic and take responsibility for what you do.
We treat people with kindness	Thank people, celebrate success and when things go wrong ask 'what can I learn'?
We act with integrity	Never let structures get in the way of doing the right thing.

## 03 Definitions

### 3.1.

The UHB and Unions agree that the pursuit of the common objectives, aims and values outlined in the introduction to this agreement shall be by negotiation, consultation and the exchange of information which are defined as follows:

#### **Negotiation**

"conferring with another with a view to reaching a compromise or agreement." This is with the understanding that if this cannot be reached after a reasonable period of time, management will make a decision to move things forward.

#### **Consultation**

'a process of dialogue that leads to a decision' (Audit Commission). This will ensure the early involvement of Unions on key issues affecting the Health Board with a meaningful opportunity to influence decisions.

#### **Communication**

Ensuring that everyone is fully and promptly informed on all relevant matters.

### 3.2.

The issues to be relayed, consulted upon or negotiated under this agreement concern the Health Board's staff, and will therefore be between the Health Board's management and those accredited representatives of the staff belonging to the organisation listed in 5.1 who are themselves employed by the Health Board.

## 04 Duties, Responsibilities and Commitment

The following outlines the agreed responsibilities and commitment of the UHB, Staff Representatives and Managers in ensuring effective partnership working:

### 4.1.

**The UHB will be responsible for:**

- Developing and implementing an effective two-way communication process across the Health Board.
- Developing a culture where managers involve staff at all times, and as soon as possible, in decision making and where staff feel able to contribute and be confident that their contribution is valued
- Developing and implementing a structure and process which requires managers at all levels to involve staff in day to day service decisions and formulation of service plans
- Developing and implementing a structure that provides Staff Representatives and Managers to input into the formulation of UHB services plans and decisions.
- Appraise and discuss in partnership with Staff Representatives, the financial performance of the UHB on a regular basis
- Ensuring all levels of management are familiar with agreements and arrangements relating to partnership working / staff involvement including the facilities agreement

- Working in partnership to manage change more effectively and achieve long term goals
- Encouraging staff to join a recognised Trade Union, staff organisation or professional organisation. Unions have an important role in representing staff both individually and collectively. As members of a Trade Union participating in the Health Board's joint negotiation / consultation machinery, staff are able to influence plans and decisions relating to employment
- Recognising and acknowledging the Unions' right and responsibility to represent the interests of their members and to work for improved conditions of employment for the employees covered by this agreement.
- Ensure Staff Representatives are afforded reasonable paid time off to undertake their duties and activities

### 4.2.

**Staff Representatives will be responsible for:**

- Recognising and acknowledging that it is the responsibility of the Health Board's management to determine the most effective way of planning, organising and managing the activities of the Health Board according to the objectives set by the Health Board.
- Accepting that management has a responsibility to keep employees directly informed on matters concerning the activities of the Health Board, but this does not obviate the requirement under this agreement to negotiate or consult through the recognised machinery on matters covered by this agreement.

- Ensuring that their representatives are at all times committed to an open and participative working style. Staff and their representatives will demonstrate this through their own behaviour and the behaviour that they expect from colleagues.
- Ensuring their time and resources are used appropriately and cost effectively
- Ensuring that decisions reached in partnership will be supported through implementation
- Communicating effectively with their members to ensure that they fully represent their views
- Support the correct, appropriate and efficient application of Health Board Policies and Procedures
- Agree to maintain confidentiality regarding sensitive issues
- Demonstrating joint commitment to the success of the organisation with a positive and constructive approach
- Ensuring that representatives are elected and accredited in accordance with Trade Union constitutions
- Provision of appropriate training for representatives and members either separately or jointly in partnership

#### 4.3.

##### **Managers will be responsible for:**

- Communicating and engaging with staff on a regular basis and keep them informed of developments across the organisation
- Encourage staff and their representatives to be involved at the earliest stages of any new developments
- Ensure that staff representatives are released to support the engagement and partnership work of the Health Board
- Ensure that the views of the staff are passed up the organisation, as well as communicating the views of the Executives and the Health Board
- Encourage and support staff to challenge and question systems of work
- Staff involvement taking place throughout the organisation, irrespective of boundaries of profession, service and functional structure
- Staff have the opportunity to express their opinions and be actively involved in issues affecting them
- Ensure that Trade Union representatives have access to all relevant information, other than confidential information about patients or staff, to support involvement in decisions that affect working lives and the delivery of healthcare
- Recognising that staff, and their representatives, must have a degree of protected time away from their place of work to enable them to attend and contribute to the staff involvement process. To achieve this, managers will ensure employees are treated fairly for their Trade Union involvement and careers are not prejudiced

## 05 Recognition

### 5.1.

The Health Board agrees to recognise for negotiation, meaningful discussion and debate on key issues and individual representation all Unions nationally recognised and who have members within the Health Board.

British Association of Occupational Therapists	BAOT
British Dental Association	BDA
British Dietetic Association	BDA
British Medical Association	BMA
British Orthoptic Society	BOS
Chartered Society of Physiotherapy	CSP
Federation of Clinical Scientists	FCS
GMB	GMB
Hospital Consultants and Specialists Association	CSA
Royal College of Midwives	RCM
Royal College of Nursing	RCN
Society of Chiropodists and Podiatrists	SOC
Society of Radiographers	SOR
UNISON	UNISON
UNITE	UNITE

### 5.2.

Any Union listed which ceases to have any members employed by the Health Board will cease to be recognised under this Agreement.

If this Union subsequently gains members and wishes to become recognised again they should follow the process set out in the Trade Union and Labour Relations (Consolidation) Act 1992.

## 06 Scope of Recognition

### 6.1.

This agreement will cover major issues of Health Board policy including:

- Organisational culture
- Organisational change
- Employment security
- Employment practices (e.g. family friendly, best practice, equal opportunities, health and safety at work, etc)
- Lifelong learning
- Employee Health and Wellbeing

### 6.2.

In addition this agreement will cover such other matters agreed as being of common interest, for example:

- Terms and Conditions of employment
- Allocation of work and duties of employment
- Matters of Discipline / Grievance
- Facilities and time off for Union Officials
- Machinery for consultation and negotiation and any procedures relating to the above and other relevant matters.
- Union membership or non-membership



## 07 Work Place Representatives

### 7.1.

In order to ensure appropriate representation of Union members and their interests, the Unions will make arrangements from among their members, who are employees of the Health Board, for such numbers of representatives as are appropriate to provide adequate representation. The election of representatives and officials shall be determined by the individual Unions in accordance with their Rules. The names of representatives, the constituencies they represent or function they carry out, and their term of office, will be notified in writing to the Executive Director of People and Culture, who will be notified of any changes in the Union representatives or officials.

### 7.2.

On receipt of details or amendments, the Executive Director of People and Culture will formally accredit the nomination, ensure the provision of facilities to accredited representatives and inform the appropriate manager(s).

### 7.3

The Health Board will provide time off and facilities in accordance with current legislation, and the relevant Code of Practice. Details of time off and facilities are outlined in the Time Off and Facilities for Accredited Representatives document which forms part of this Agreement.

### 7.4.

The Health Board recognises the value of work place representatives and will ensure that representatives suffer no detriment in relation to career progression as a result of their role.

### 7.5.

It is acknowledged that there will be circumstances where it is beneficial for Full Time Officers to be involved. Full Time Officers may therefore be involved at the request of the local representatives, following prior notification to management and in accordance with any constitutional arrangements agreed for any joint forum.

### 7.6.

The Health Board also recognises the role and contribution of Union Learning Representatives in accordance with the provisions of the Employment Act 2002, and the role of Health and Safety Representatives

## 08 Communication

### 8.1.

The Health Board will provide timely information required for collective bargaining purposes, in accordance with current legislation and Code of Practice.

### 8.2.

The Health Board will also seek to ensure that its' Communication Policy and practices ensure that all staff are able to be informed of the Health Board's plans, objectives and progress.

### 8.3.

The Unions will supply to the Health Board, upon request, a copy of their rules, either free or at a reasonable charge.

## 09 Negotiation / Consultation Machinery

### 9.1.

The NHS Terms and Conditions handbook requires that Joint Consultation arrangements should be set up in agreement with employee representatives. Agreement should be reached on a number of issues, including:

- Size and composition of the committee
- Organisation of committee meetings
- Subjects to discuss

- Facilities for committee members; and
- Arrangements for reporting back

### 9.2.

Detailed arrangements for the working of the Health Board's Local Partnership Forum are outlined in the Terms of Reference for that committee and form part of this agreement, and are attached as Appendix 1.

## 10 Review

### 10.1.

This agreement may be amended at any time following agreement by both parties.

### 10.2.

The operation of the agreement will be reviewed after a period of 3 years from its commencement.

## Appendix 1

# Local Partnership Forum

## Terms of Reference and Operating Arrangements

### 01 Introduction

#### 1.1.

The Cardiff and Vale University Health Board Local Partnership Forum (LPF) is the formal mechanism where the Health Board and trade unions\* work together to improve health services for the people of Cardiff and the Vale of Glamorgan and for others accessing services provided by the Health Board. It is the forum where key stakeholders will engage with each other to inform, debate and seek to agree local priorities on workforce and health service issues.

#### 1.2

Cardiff and Vale University Health Board (the UHB) will engage staff organisations in the key discussions at the UHB Board, UHB Partnership Forum and Locality/Clinical Board level.

#### 1.3

The UHB LPF will provide the formal mechanism for consultation, negotiation and communication between the Unions and management. The TUC principles of partnership will apply the principles are attached at Annex 1.

*\* all references to Trade unions include Trade Unions, Professional Staff Organisations and Staff Associations*

## General Principles

### 1.4.

The Partnership Forum accepts that partnerships help the workforce and management work through challenges and to grow and strengthen their organisations. Relationships are built on trust and confidence and demonstrate a real commitment to work together.

The principles of true partnership working between Trades Union and Management are as follows:

- TU's and management show joint commitment to the success of the organisation with a positive and constructive approach
- they recognise the legitimacy of other partners and their interests and treat all parties with trust and mutual respect
- they demonstrate commitment to security for workers and flexible ways of working
- they share success – rewards must be felt to be fair
- they practice open and transparent communication – sharing information widely with openness, honesty and transparency
- they must bring effective representation of the views and interests of the workforce
- they must demonstrate a commitment to work with and learn from each other.

All members must:

- be prepared to engage with and contribute fully to the Forum's activities and in a manner that upholds the standards of good governance set for the NHS in Wales
- comply with their terms and conditions of appointment

- equip themselves to fulfil the breadth of their responsibilities by participating in appropriate personal and organisational development programmes, and
- promote the work of the LPF within the professional discipline he/she represents.

A Code of Conduct is attached as Annex 2.

## 02 Purpose

### 2.1.

The purpose of the UHB Local Partnership Forum is to:

- establish a regular and formal dialogue between the UHB Executive and the Trade Unions on matters relating to workforce and health service issues
- enable Employers and Trade Unions to put forward issues affecting the workforce
- provide opportunities for Trade Unions and Managers to input into UHB service development plans at an early stage
- consider the implications on staff of service reviews and identify and seek to agree new ways of working
- consider the implications for staff of NHS reorganisation at a national or local level and to work in partnership to achieve the mutually successful implementation
- appraise and discuss in partnership the financial performance of the organisation on a regular basis
- appraise and discuss in partnership the UHB service and activity and its implications
- provide opportunities to identify and seek to agree quality issues, including clinical governance, particularly where such issues have implications for staff
- communicate to the partners the key decisions taken by the Health Board and senior management
- consider national developments in NHS Wales Workforce Strategy and the implications for the UHB including matters of service re-profiling
- negotiate on matters subject to local determination
- ensure Trade Union representatives are afforded reasonable paid time off to undertake trade union duties
- develop in partnership appropriate facilities arrangements using Agenda for Change Facilities Agreement as a minimum standard.

In addition the Health Board will establish Clinical Board Partnership Forums to establish ongoing dialogue, communication and consultation on service and operational management issues specific to Clinical Board areas. Each Clinical Board will have a 'Lead' Staff Representative who will jointly chair the Clinical Board Partnership Forum. Each Clinical Board Partnership Forum will report to the Health Board Local Partnership Forum.

## 03 Delegated Powers and Authority

### 3.1.

The Partnership Forum may establish sub committees or task and finish groups to carry out on its behalf specific aspects of Forum.

Three sub-groups have been established, namely the Employment Policies sub-group (EPSG), the Workforce Partnership Group (WPG) and the Staff Benefit's Group.

#### 3.1.1.

##### **Employment Policies Sub Group**

Local Employment Policies will continue to be developed in partnership. For each policy a nominated Management and Staff representative will jointly develop the policies, seeking views/comments from management and staff colleagues. Each Policy will be subject to an Equalities Impact Assessment.

The proposed policies will be submitted to the Health Board Partnership Forum for consideration with final approval being made by the Health Board's Strategy and Delivery Committee.

The EPSG will approve all employment and other related Human Resources (HR), Workforce and Organisational Development (OD) procedures and other written control documents

### 3.1.2.

##### **Workforce Partnership Group**

The Workforce Partnership Group (WPG) has been created to provide a forum for the Health Board and Trade Unions to work together on issues of service development, engagement and communication specifically as they affect the workforce

The purpose of the WPG is to provide a focused opportunity to establish a regular and formal dialogue between the Director of Workforce and OD and the Trade Unions on matters relating specifically to workforce issues.

### 3.1.3

##### **Staff Benefits Group**

Cardiff and Vale University Health Board is one of the major employers in Wales with over 15,000 staff.

Given the size of the organisation this provides a great opportunity to ensure all staff has exclusive access to a comprehensive range of specially selected products and services. As an employee of the Health Board this will provide money saving discounts and extra value for money on special and everyday purchases.

The Health Board has established a "Staff Benefits Group" to explore and maximise benefits for staff, and advising the Local Partnership Forum (LPF).

## 04 Membership

### Members

#### 4.1

All members of the LPF are full and equal members and share responsibility for the decisions of the LPF. The Health Board shall agree the overall size and composition of the LPF in consultation with those Trades Unions it recognises. The UHB's Trade Union Independent Member will be expected to attend the LPF in an ex-officio capacity. As a minimum, the membership of the LPF shall comprise:

#### Chair

Joint chairmanship by the Executive Director of People and Culture and Chair of Staff Representatives

#### Members

#### Management Representatives

Chief Executive

Executive Director of Finance

Medical Director

Executive Director of Nursing

Executive Director of Planning

Executive Director of Therapies and Health Sciences

Chief Operating Officer

Executive Director of People and Culture (Chair)

Director of Corporate Governance

Director of Communications and Engagement

Assistant Director of Organisation Development

Assistant Director of Workforce

Head of Workforce Governance

Peter Welsh, Hospital General Manager, UHL and Barry

### Staff Representatives

The Health Board recognises those Trade Unions listed in Annex 3 for the representation of members who are employed by the organisation.

It will be the prerogative of the staff representatives to decide on the formula to achieve the maximum number of representatives. This can be reviewed locally as required.

#### Standing Invitation Independent Member (Trades Unions)

#### 4.2.

Staff representatives must be employed by the organisation and accredited by their respective organisations. If a representative ceases to be employed by the Health Board or ceases to be a member of a nominating organisation then he/she will automatically cease to be a member of the LPF. Full Time Officers of the Trade Unions may attend meetings subject to prior notification and agreement.

#### 4.3

Members of the Forum who are unable to attend a meeting may send a suitable deputy who will contribute to the meeting being quorate.

#### 4.4.

Consistent attendance and commitment to participate in discussions is essential. Where a member of the Forum does not attend within a year (except for reasons of sickness, pre-planned annual leave, maternity leave, etc.), the Joint Chairs will write to the member and bring the response to the next meeting for further consideration and possible removal from the Forum.

## **In attendance**

### **4.5.**

By invitation

The LPF Joint Chairs may invite:  
any others from within or outside the organisation  
to attend all or part of a meeting to assist it with its  
discussions on any particular matter

## **Chairs**

### **4.5**

The Executive Director of People and Culture and Staff Representatives' Chair will co-chair the LPF. The Chairs shall work in partnership with each other and, as appropriate, with the Chairs of the Health Board's other advisory groups. Supported by the Workforce Governance Manager, Chairs shall ensure that key and appropriate issues are discussed by the Forum in a timely manner with all the necessary information and advice being made available to members to inform the debate and ultimate resolutions. Vice Chairs will be identified.

## **Secretariat**

### **4.8**

The Workforce Governance Manager will act as Secretary and will be responsible for the maintenance of the constitution of the membership, the circulation of agenda and minutes and notification of meetings.

### **4.9**

Consistent attendance and commitment to participate in discussions is essential. Where a member of the Forum does not attend within a year (except for reasons of sickness, pre-planned annual leave, maternity leave, etc.), the joint Chairs will write to the member and bring the response to the next meeting for further consideration and possible removal from the Forum.

## **05 Committee Meetings**

### **Quorum**

#### **5.1**

There should be 6 management representatives and 6 staff representatives for the meeting to be quorate.

#### **5.2**

If the meeting is not quorate no decisions can be made but information may be exchanged and recommendations can be endorsed at the next meeting (when quorate).

### **Frequency of Meetings**

#### **5.3**

Meetings will be held bi monthly but this may be changed to reflect the need of either staff or management representatives.

#### **5.4**

Where joint chairs agree extraordinary meetings may be scheduled with 7 calendar days notice.

## Management of Meetings

### 5.6

The business of the meeting shall be restricted to matters pertaining to Health Board Wide strategic issues. Local operational issues should be raised at the Clinical Board Partnership Forums and will not be considered unless it is agreed that such issues have Health Board wide implications.

The agenda and papers shall be sent out no later than 7 days prior to the following meeting. Items for the agenda and supporting papers should be notified to the LPF Secretary as early as possible, and in the event at least three weeks in advance of the meeting.

## 06 Reporting and Assurance Arrangements

### 6.1

The LPF shall:

- report each of its meetings formally to the Board via submission of its minutes;
- bring to the Board's specific attention any significant matter under consideration by the Forum;

## 07 Review

### 7.1

These terms of reference and operating arrangements shall be reviewed as directed by Welsh Government following recommendation by the NHS Wales

Partnership Forum or as and when required by the Health Board.

### Annex 1

#### Six TUC Principles of Partnership Working

- a shared commitment to the success of the organisation
- a focus on the quality of working life
- recognition of the legitimate roles of the employer and the trade union
- a commitment by the employer to employment security
- openness on both sides and a willingness by the employer to share information and discuss the future plans for the organisation
- adding value – a shared understanding that the partnership is delivering measurable improvements for the employer, the union and employees

### Annex 2

#### Code of Conduct

A code of conduct for meetings sets ground rules for all participants: -

- Respect the meeting start time and arrive punctually
- Attend the meeting well-prepared, willing to contribute and with a positive attitude
- Listen actively. Allow others to explain or clarify when necessary
- Observe the requirement that only one person speaks at a time
- Avoid 'put downs' of views or points made by colleagues
- Respect a colleague's point of view
- Avoid using negative behaviours e.g. sarcasm, point-scoring, personalisation



- Try not to react negatively to criticism or take as a personal slight
- Put forward criticism in a positive way
- Be mindful that decisions have to be made and it is not possible to accommodate all individual views
- No 'side-meetings' to take place
- Respect the Chair
- Failure to adhere to the Code of Conduct may result in the suspension or removal of the member
- Be mindful of other agenda items when delivering to ensure that the meeting runs on time.

### **Annex 3**

#### **List of Recognised Trade Unions**

British Association of Occupational Therapists

British Dental Association

British Dietetic Association

British Medical Association

British Orthoptic Society

Chartered Society of Physiotherapy

Federation of Clinical Scientists

GMB

Hospital Consultants and Specialists Association

Royal College of Midwives

Royal College of Nursing

Society of Chiropodists and Podiatrists

Society of Radiographers

UNISON

UNITE

## Appendix 2

# Welsh Partnership Forum Time Off And Facilities For Trade Union Representatives

Key Principles Framework November 2011

## Introduction

1. The Welsh Partnership Forum is committed to the principles of partnership working and staff involvement. Partnership underpins and facilitates the development of sound and effective employee relations throughout the NHS. It also recognises that the participation of trade union representatives in the partnership process can contribute to delivering improved services to patients and users.
2. The Welsh Partnership Forum recognises the importance of ensuring that the representatives of trade unions recognised for purposes of collective bargaining at local level are released appropriately to participate in local partnership arrangements. The principles of partnership working are set out in the annex to this document.
3. It is for employers and representatives of locally recognised trade unions to agree in partnership local arrangements and procedures on time off and facilities that are appropriate to meet local circumstances. Local arrangements are expected to be consistent with the principles set out below.

## Time Off for Accredited Trade Union Representatives Accredited Representatives

4. Local arrangements should apply to accredited representatives of trade unions recognised by local NHS organisations. Accreditation will only be given to employees of the organisation who have been duly elected or appointed in accordance with the rules of the respective trade unions.
5. Accredited representatives of trade unions will:
  - Abide by the rules of their trade union and the policies and procedures of the employing organisation. Represent their members on matters that are of concern to the employing organisation and/or its employees.
6. It will be for the relevant trade unions to discuss and agree with the local employer an appropriate number of representatives. Local discussions should have regard to the size and location of the unions' membership and the expected workload associated with the role. The unions would be required to issue written credentials and notify the human resources department of the number and location of work groups for which each representative will be responsible.
7. Subject to the needs of the service and adequate notification, accredited representatives should be permitted paid time off, including time to prepare for meetings and disseminate information and outcomes to members, during working hours to carry out duties that are concerned with any aspect of:-
  - Negotiation and/or consultation on matters relating to terms and conditions of employment or agreed partnership processes
    - examples include:
      - terms and conditions of employment;
      - engagement or termination of employment;
      - allocation of work;

- matters of discipline;
  - grievances and disputes;
  - union membership or non-membership;
  - facilities for trade union representatives;
  - machinery for negotiation or consultation or other procedures.
- Meetings with members;
  - Meetings with other lay officials or full time officers;
  - Appearing on behalf of members before internal or external bodies;
  - All joint policy implementation and partnership working;
  - Environmental issues linked to the Green workplaces projects;
  - Other matters relating to employee relations and partnership working
8. The expectation is that it is good practice that staff representatives should indicate the general nature of the business for which time off is required, where they can be contacted if required. Requests should be made as far in advance as possible as is reasonable in the circumstances. Wherever possible, the representatives should indicate the anticipated period of absence. The expectation is that requests for paid time off for trade union representatives will not be unreasonably refused.

### Training

9. Accredited trade union representatives should be given adequate time off to allow them to attend trade union approved training courses or events. Time off should not be regarded as automatic, as employers have responsibilities to take account of the needs of service

delivery. However, the expectation is that requests for paid time off to attend training courses should not be unreasonably refused as long as locally agreed processes are followed.

10. The expectation is that requests for release for training should be made with reasonable notice to the appropriate manager. Any training course should be relevant to their duties approved by their trade union. Local representatives should provide details of the course to local management.

### Payment Arrangements

11. Where time with pay has been approved, the payment due will equate to the earnings the employee would otherwise have received had/she been at work.
12. Where meetings called by management are held on matters covered by paragraphs 7 where staff representatives have to attend outside their normal working hours, equivalent time off will be granted or appropriate payment should be made by local agreement.
13. There should be local agreement on when travelling and subsistence expenses will be reimbursed to accredited representatives who are undertaking approved work in relation to the partnership process and/or joint policy implementations (as listed in paragraph 7).

### Trades Union Activities

14. It is the responsibility of the recognised local trade unions to ensure that the time and resources provided in this context are used appropriately.
15. NHS organisations are encouraged to support partnership

working, by giving reasonable time off, during working hours to enable trade union members or representatives for:-

- executive committee meetings or annual conference or regional union meetings;
- voting in properly conducted ballots on industrial relations;
- voting in union elections;
- meetings to discuss urgent matters relating to the workplace;
- recruitment and organisation of members.

16. Local arrangements should specify the circumstances when time off may be refused for either representatives or members. These may include:-

- unreasonable notice periods on behalf of the representatives
- activities which do not fall within the any of the categories in paragraphs 7, 10 and 15;
- activities are not authorised by the union
- service needs;

17. Locally, it may be agreed that it is appropriate in the interests of partnership working and good industrial relations for trade union representatives to be released from work for regular defined periods each week.

### **Trade Union Learning Representatives**

18. Trade Union Learning representatives are accredited by their unions to support organisations in identifying training needs and ensuring staff access to training. Learning representatives also have the right to reasonable paid time off for undertaking these duties and for relevant training.

### **Health and Safety Representatives**

19. The Safety Representatives and Safety Committee Regulations 1977 provides a legal entitlement for trade union appointed safety representatives to have paid time from their normal work to carry out their functions and undergo training

### **Facilities For Trades Union Representatives**

20. The local partnership should agree the facilities that are provided to representatives of recognised trade unions. It is recommended that local employers provide the following facilities:-

- Access to appropriate private accommodation, with storage facilities for documentation, appropriate administrative facilities and access to meeting rooms.
- Access to internal and external telephones with due regard given for the need for privacy and confidentiality.
- Access to appropriate internal & external mail systems.
- Appropriate access to the employer's intranet and email systems.
- Access to appropriate computer facilities
- Access to sufficient notice boards at all major locations for the display of trade union literature and information.

- Access for staff representatives to all joint documents relating to the local partnership process.
- Based on the geographical nature of the organisation consideration may need to be given to access to suitable transport facilities.
- Backfilling of posts where practical. The extent to which practical would inevitably be dependent on such factors as the numbers of representatives needing time off and the work areas that would need to be covered and the needs of the service.

- Commitment to work with and learn from each other;
- Early discussion of emerging issues and maintaining dialogue on policy and priorities;
- Commitment to ensuring high quality outcomes;
- Where appropriate, confidentiality and agreed external positions;
- Making the best use of resources;
- Ensuring a no surprise culture.

## Annex

### Principles and Best Practice of Partnership Working

[Taken from: Partnership Agreement. An agreement between Department of Health, NHS Employers and NHS Trade Unions.]

To deliver partnership working successfully it is important to develop good formal and informal working relations that build trust and share responsibility, whilst respecting difference. To facilitate this, all parties commit to adopt the following principles in their dealings with each other:

- Building trust and a mutual respect for each other's roles and responsibilities;
- Openness, honesty and transparency in communications;
- Top level commitment;
- A positive and constructive approach;