Health and Social Care Professions Effective Representation Tool kit
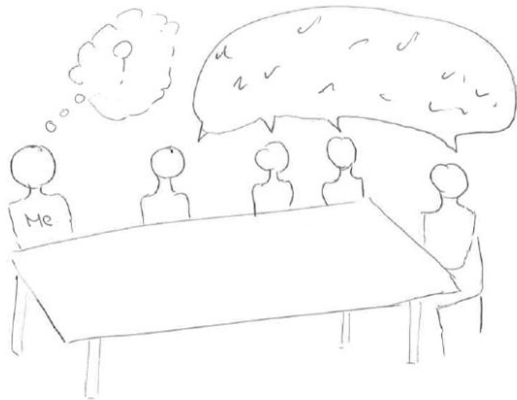
A support document for HSCPs in representative roles on National Groups and Committees

Health & Social Care Professions

Seirbhís Sláinte | Building a
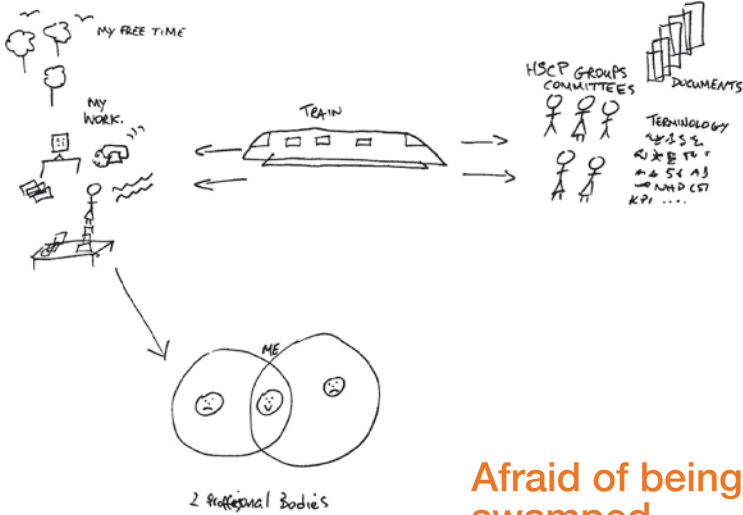Níos Fearr | Better Health
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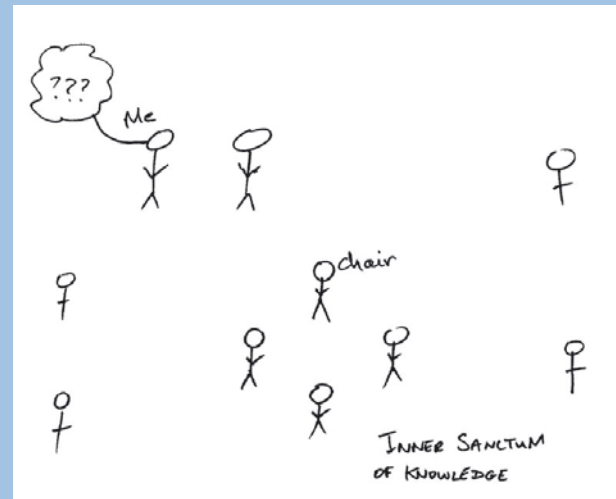
Flitting Around

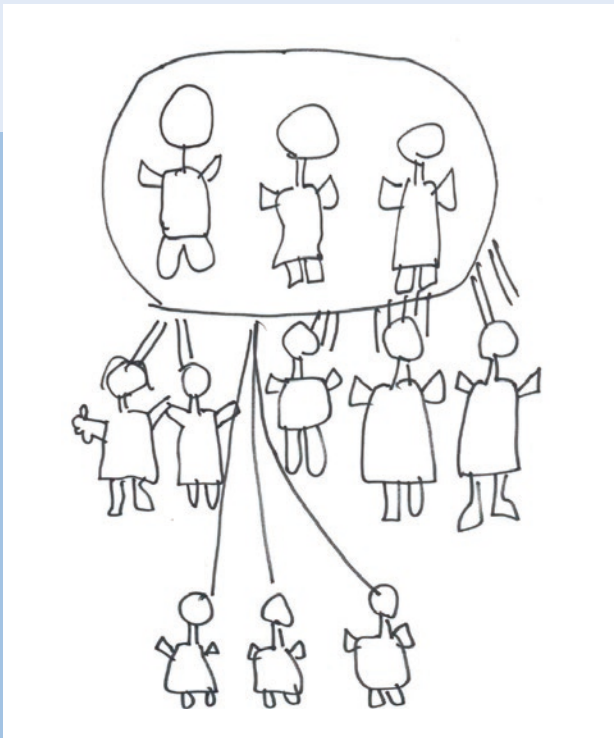## A lot of talk no direction

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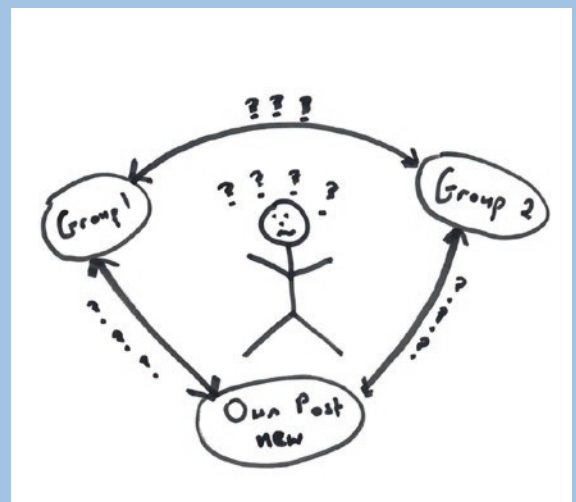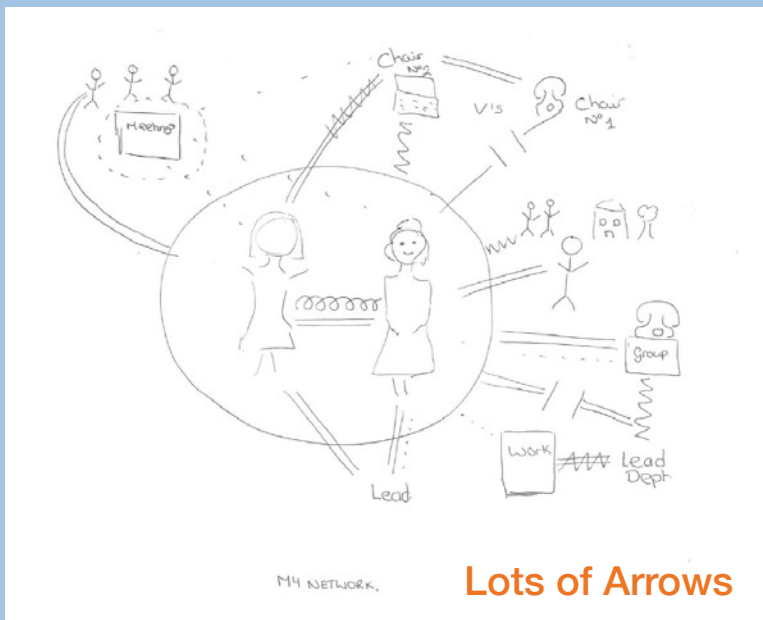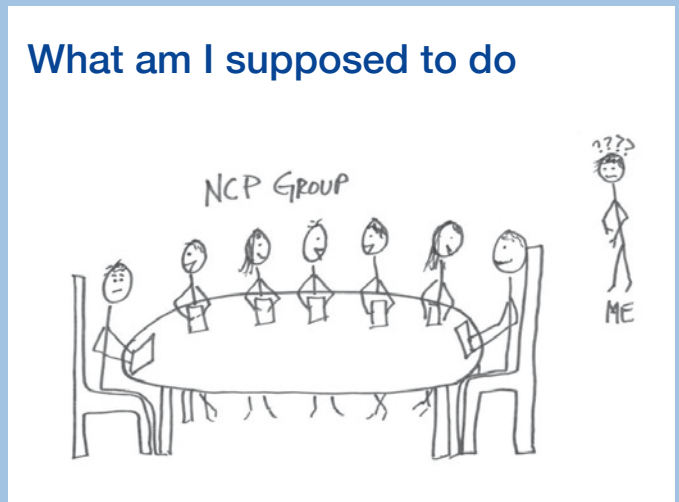
Afraid of being swamped

These are images of peoples' experiences as members of national groups and were created by participants during the Effective Representation programmes.

How do I influence the holy trinity

What am I supposed to do

Lots of Arrows

Where do I fit in

Contents

Health and Social Care Professions Effective Representation Toolkit

Welcome to this Effective Representation tool kit designed to assist Health and Social Care Professionals (HSCP) to take up representative roles on national groups effectively.

When thinking about representative roles on groups it is really important to think about the reason for the need for representation and who is ultimately being represented. One thing that is very clear is that the rationale and compelling reason to have appropriate HSCP representation on national groups designing, planning or implementing services is to ensure that the full breadth of expertise available is brought to bear for the benefit of those who will use the service – the patient/service user. With that focus in mind, what is of paramount importance is to ensure that whatever representatives and processes are put in place they harness the best evidence based expertise for the particular task and group as well as being connected to/grounded in front line knowledge and experience. This toolkit is therefore about representing and bringing forth HSCP input for best evidence informed, person centred, integrated care rather than particular profession specific groups or positions. This is in alignment with HSCP Priority 1: Visibility of the Health and Social Care Professions Education and Development Strategy 2016-2019, where the intended outcome is that 'The value of HSCP and their contribution to health and social care services and service user outcomes is better understood and maximised.'

History of HSCP in representative roles

For many years now, certainly since the creation of the National Clinical and Integrated Care Programmes, there have been HSCP representatives on national groups involved in designing clinical pathways of care. In the beginning the focus was on the Therapy Professions, a group of 6 professions congregated following the Expert Group Report on Various Health Professions, 2000. Specific mechanisms were put in place in collaboration with the Therapy Professions Committee and Therapy Advisor. Later, a wider range of HSCP were involved, reflective of the patient journey and requirements. An early development in this area was the inclusion by the Acute Medicine Programme of the wider family of HSCP. A common need emerging from all those involved as representatives named as discipline-specific expertise or asked to represent a wider HSCP perspective, was for support and preparation for the role as well as development of new skills to be effective in the role.

## Effective Representation Programme

To support HSCP taking up representative roles an Effective Representation Programme was developed. The need for the programme and specific requirements was informed by consultation and focus groups with those in representative roles and their professional bodies. For further information about the background and development of the programme see Appendix 1.

Principles behind the design of the programme

The purpose of the programme is to prepare and support HSCP to take up roles on national groups and committees with maximum effect. The programme was designed for people already nominated to/members of national groups so that participants could work with the live experience as against theoretical input alone.

The Programme was designed around three phases of being on a National Group as follows:

1.	2.	3.
Entry to the role/group.	**Being in the role.**	**Leaving the role.**
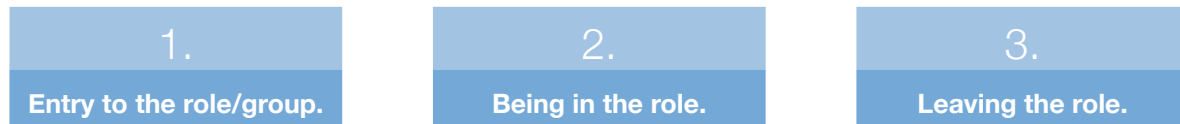
Organisation development input was specifically sought to ensure a whole system approach and that the programme and outputs would also be an organisational intervention.

The methodology behind the development, design and implementation of the programme was based on a whole system approach and core organisational development principles as originally defined by Beckhard and Harris (1977). See Appendix 1 for the principles.

In addition, the programme was built around personal development to take up the role and evaluation and feedback to date has proved that to be effective. This reflects the understanding that people work within systems and when looked at in a whole system way everything that happens is ultimately personal. There has been feedback to indicate that the programme has had wider impacts for participants as they have applied insights and development to wider aspects of their role and working life with positive impacts.

One of the things highlighted through the programme and its development was the lack of a clear and transparent process to select nominees. Subsequently the National Office engaged with the professional bodies to design the process and relevant forms. Copies of the forms for requesting representation through the National HSCP Office are included in the appendices together with a summary of the current support provided.

Competencies for representative roles

Each of the three programme groups considered the competencies required from their experience which may be summarised as follows:

✔ Leadership

✔ Confidence

✔ Team and collaborative skills

✔ Vision

✔ Organisational skills

✔ Understanding power and group dynamics

✔ Initiative and motivation

✔ Change management

✔ Experience and knowledge

✔ Negotiation skills

Overall, from the National Office view point the following are essential core competencies in addition to the specific clinical/discipline specific expertise required for the particular role:

1. Planning and organising.

2. Self-awareness and personal impact.

3. Team work, collaboration and engagement.

It has been clear from working with the three cohorts who have taken the programme that those taking on representative roles to date have a high degree of personal commitment and drive and that a high level of resilience is required. Building and maintaining resilience was introduced to the programme in recognition of the importance of maintaining self and balance. To complement this and provide other avenues for support for those in representative roles, a network for those who have taken the programme and others in representative roles is being established. Access to mentoring and coaching as required in the context of representative roles is also being facilitated by the National HSCP Office.

The tool kit

This tool kit has emerged following three iterations of the Effective Representation Programme through 2017 and first half of 2018. It represents collective outputs from all three groups and is designed to be of assistance to both those taking up, or considering taking up, representative roles on national groups as well as their nominating bodies. The toolkit is designed based on the experiences of the participants and what they found useful.

The toolkit is divided into three chapters which mirror the three phases outlined above – entry, being in role and leaving. Each chapter covers three areas:

a.   **Things to consider** – during the course of the programme the participants were introduced to a number of key concepts and related tools.

b.   **Challenges** – this section will outline key challenges at each phase of working on a national group, these are drawn from the collective experiences of all three cohorts of HSCP who have been in representative roles. These mirror closely the challenges identified in initial development of the programme.

c.   **Top tips and tools** – this section is a synthesis of the top tips that each group generated at the end of each module. They are in effect the things that they would have liked to know in advance or that they view as important learning to share based on their experience. Some of the tools related to the key things to consider are included here for reference.

Section 1: Entry to the role/group

Things to consider

Your entry into the role can have a significant impact on how effective you can be in the role. You may be affected by how you are recruited to the role. This may include: volunteering, nomination, application and selection process, persuasion, being put on the spot, filling a gap.

Being aware of the potential impacts of the method of entry on you and the potential perception of others can guide the questions you ask on entry and the contracting conversations you need to have with others.

First impressions can be powerful. Bear in mind that your behaviour, your introduction and what you can contribute will impact your effectiveness going forward. Consider planning how you will **introduce yourself, outline your role**, and what you feel you can **contribute to the group.**

Contracting

A crucial part of the entry process is contracting. The more successful the initial contracting process is the more effectively you will be able to take up your role.

In this context a contract is being considered as an explicit agreement of what the nominee and Client (person nominating or seeking a nominee) expect from each other and how they are going to work together. Contracting well means that you can take up the role authentically.

Contracting conversations may be needed with a number of parties, these may be considered your 'clients'. Contracting may take more than one meeting and it is important to seek further clarification if you are not sure about something during contracting meetings. The following are some of the key parties with whom you need to contract:

- Your nominating professional body/other relevant professional bodies
- Your line manager
- The chair of the group you are to join

Good contracting should help set you up for success. The business of the contracting phase is to negotiate wants, cope with mixed motivation, surface concerns about exposure and loss of control and clarify all parties to the contract (Block, 2000 p58). Some useful questions to assist you in the contracting process are listed on the next page. Appendix 2 includes further information and checklists to support the contracting process. It is always a good idea to have your contract agreed, written down and signed off by all parties. Contracts should be reviewed periodically and a re-contracting process take place as necessary.

Useful questions to consider during contracting on entry

The following questions will help guide your initial conversations regarding contracting for the role.

Background:

- What is the purpose of the group?
- Are there previously agreed documents?
- What has the HSCP involvement been to date?
- What supports are in place?

Information about the group:

- What is the group's composition (groups represented, and members)?
- What are the terms of reference?
- What are the group's objectives?
- What projects are going on in the group?
- What is expected outcome of process:
  - ► A model of care?
  - ► Staffing guidelines?
  - ► Clinical guidelines?
  - ► Other?
- What is the frequency of meetings?

Your commitment:

- What is the expected time commitment?
- Will my time be backfilled?
- What is the duration of the role?
- What do you expect of me?

Your role:

- What is my role?
- Who am I representing on the group?
- What information can I share?
- Do they know I am a …?
- What skills are this group looking for?
- Clear pathway for feedback from group?
- What makes me the best person from the profession to sit on this group? i.e. person handing over needs to think this through and then discuss with you before accepting/agreeing to role.
- Does the group you are representing know you have asked me?

Supports:

- How will I be supported by my professional body?
- What is the handover or existing process and who is responsible for finding a successor?
- Clear identification of other members who need sit on "working group" if required?

Can I:

- Make contact with equivalent medical/nursing members?
- Make contact with existing members of group?
- Can I think about it for a while?

When using this checklist of questions and having initial contracting conversations tune into what you are comfortable about and revisit any other outstanding areas. If at the end of the contracting process you can answer all of the questions above, you should have a good contract. The important thing is that they are written down and agreed.

'self-doubt'

'am I the wrong person?'

'unknown time commitment'

'felt like a foreigner'

Some quotes from representatives on entry

'difficult to take up role'

'flung into the situation'

'felt shrivelled up'

'isolated, no clear mandate'

'secret club'

The challenges in the entry phase

According to Krantz and Maltz (1997 p148) "the reasons individuals are often unable to effectively assume their role can be numerous and frequently be attributed to one or two specific issues including the following:

1.   No clear mandate or direction.

2.   Difficulties in the roles configuration.

3.   Insufficient functional links to complementary roles.

4.   Multiple roles (perhaps conflicting) contained in a 'single' role.

5.   Changing demands on both the formal and informal aspects of the role.

6.   Further competency and/or skill development for the incumbent.

7.   Organisational and/or environmental issues that 'spill over' into the role.

8.   Personal dilemmas, behaviours, and/or styles that make functioning in the role difficult."

The following is a summary of the challenges identified by representatives from all three programme cohorts in joining a group or committee.

▶ Inadequate preparation and information going into the role.

▶ How you ended up on group – were you pressurised, did you feel obliged, were you 'voluntold', how transparent was the nomination process, were there nomination politics?

▶ Who are you representing? You may be a representative from your own profession only or you may be there to represent a wider group of professions. It will be really important to understand the scope, who you are representing, who are the key stakeholders and key people, who are you answerable to.

▶ Getting support – from your own profession, from other professions, from your own job/team colleagues/service.

▶ Clarity in relation to the role, associated responsibilities, the purpose of group.

▶ Time commitment, how much is required? What about balancing the role with your own job, what is possible, what can be negotiated?

▶ Value of diversity – you will bring fresh eyes to the group.

▶ Governance – what is the governance, where is the accountability, decision making?

▶ Boundaries.

▶ Communication – who, what and how is that to be managed, clarity about confidentiality requirements.

Tips and tools for the entry phase

Summary of top 10 tips on entry from all three groups

1.   Clarify and manage expectations – your own and others.

    a.   Time commitment and lifespan of representative role

    b.   Background documentation

    c.   Objectives of the role and the group

    d.   Actions required

    e.   Policy

    f.   Budget

2.   Clarify the nomination process – transparency.

3.   Check motivation, understand 'why am I here?'

    a.   My own interest?

    b.   Personality

    c.   Nominated by manager?

    d.   Consider conflicting priorities

    e.   Why have I been asked?

    f.   Other?

4. **Collect the history of the group to date.**

    a.   Terms of reference and membership

    b.   Stakeholders

    c.   Lines of communication

    d.   Feedback

    e.   Previous HSCP representative?

5. **Clarify the supports available.**

6. **Contract well before proceeding with nominator, own manager, chair of group. Contract to include a review meeting.**

7. **Expect differences in the group in styles and approach.**

8. **Get a handover and consider own eventual exit strategy.**

9. **Clarify authority around decision making.**

10. **Slow down, reflect, take a breath before saying 'yes'.**

Some useful tools

Other useful tools at entry stage include any tools or instruments which give you insight to your own style and personality preferences and can help in terms of understanding differences in styles, approaches and preferences in groups.

a.   Ground rules for contracting (appendix 2)

b.   Useful questions on entry (above)

c.   Self-awareness tools, for example the Meyers Briggs Type Indicator, Enneagram, emotional intelligence questionnaires, 360 etc.

d.   Representative role checklist (adapted from Krantz and Maltz 1997) (appendix 3)

Another key tool at this stage is to consider the role in the context of the Grubb model. This can also assist in guiding personal reflection on the role and areas that may need attention to take up the role effectively.

Role Analysis – Grubb Model
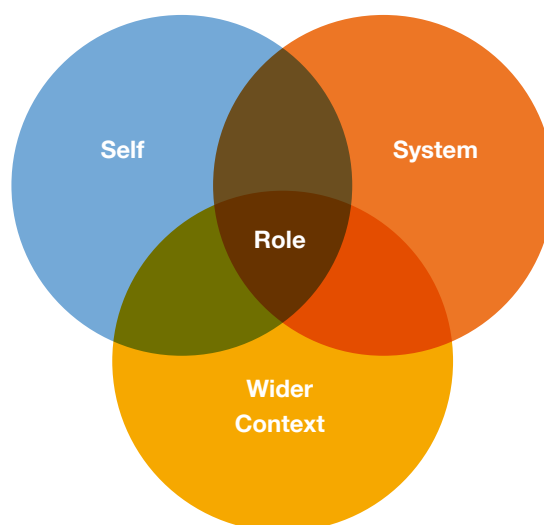
This tool is used by drawing your own three circles of yourself, the system you work within and then the wider context in which all of that sits. The more the circles overlap the more effective you will be in your role.

In this context self refers to all you know about yourself, your knowledge, competencies, experience, personal style, your idea of yourself in the role etc.

The system is described by Bateson (1997) as "activities with a boundary". In this case, it refers to the committee or group of which the representative is a member

The wider context refers to the bigger picture for example, driving policies, international best practice, political context, economic, social etc

Role: When joining a committee, the expectation is that the person is given a position and title, e.g. member of a committee, and a task to carry out. However the person has then to **discover what is the role for her/him**., then **make** that role and finally to **take** that role (Reed, 1997). This process is a never-ending recurring process.

According to Hutton (1997) one needs to know oneself and "the intellectual and emotional contribution he can offer to the system. He also needs to be knowledgeable about the context in which the system operates."

The induction period is crucial in helping individuals begin to find, make then take their roles.

Some examples – there may be people who know themselves and wider system very well, but not the system they are entering into. In order to strengthen taking up their role they need to spend time learning more about the system

Similarly, a person may know the system, i.e the committee and it's work, and the wider environment, but not know themselves well-this person will strengthen their role by learning more about themselves, building their competencies etc.

Finally, if one knows themselves and their system but does not know the wider context this will impact on their capacity to take up their role fully.

Peoples circles look different at different times and according to the role they are taking up and the more the three circles overlap the greater capacity to take up your role.

Section 2: Being in the role

When you take up a role on a national group/committee there are challenges and opportunities which influence how you can succeed and find your voice. These may include:

- Team effectiveness

- Team psychodynamics

- Organisational Roles

- Your network

- Communication

- Time management

- Action summaries

Things to consider

Key things to consider at this stage include:

- Team dynamics and team functioning. Groups may be considered to be temporary teams and thinking about aspects of team can assist in contributing effectively to a group and asking helpful and pertinent questions to support group functioning and development.

- Effectiveness of meetings and use of time.

- Clarity of strategy or plan.

- Clarity of expectations, your own, the group, those who nominated you

- Networks – considering your own network of people and connections and how well matched that is to the role you have taken on and needs of the group can help identify gaps and actions required.

- Conflict management style and effective management for the particular situation.

- Contracting continues to be important even when on a group, it is never too late to have a contracting conversation if you didn't have one at the outset and as things move on re-contracting may be necessary.

- Communication routes and updating with key stakeholders and advisory groups of other relevant HSCP, if you are representing more than your own discipline, is of key importance for effectiveness.

- You should also give further consideration to your own role on the group and the checklist included in the appendix may be useful.

- Finding your voice and asking key questions, when necessary, to speak to any lack of clarity, challenges or difficulties arising in the functioning of the group or your ability to fulfil your role.

'filling space with nothing, unproductive meetings'

'so much and so little'

'feeling inexperienced'

'inner sanctum'

'floated into it and left with it'

Some quotes from representatives on being in a group

'laborious and onerous'

'defensiveness, afraid of being swamped, couldn't listen'

'anxiety of coming into an established group'

'anxiety that nothing is happening'

'wasn't myself'

frustration, isolation

The challenges

The following is a summary of the common challenges that representatives experienced. Clearly different dynamics emerge in different groups but there were some clear themes.

▶ Discussions and decisions happening outside the group.

▶ Information not disseminated or shared too late or too little content for meaningful contribution.

▶ Poor organisation, lack of completion, progress, poor chairing.

▶ Drift in purpose and function of group without review.

▶ Frequent changes in membership of group.

▶ Hierarchy, power dynamics, tokenism, personalities, hidden agendas.

▶ Conflict of interest.

▶ Level of confidence, recognition that you are an equal member.

▶ Understanding how far to communicate, with who, how, when. This particularly outside of profession.

▶ Eliciting contributions, feedback, support from group members, own profession, professions represented, appropriate to the aims and purpose of the group.

▶ Dealing with feedback.

▶ Managing expectations of stakeholders.

▶ Workload distribution, unrealistic expectations and demands.

▶ Lack of protected time for the work.

▶ Lack of understanding/appreciation of new roles/HSCPs.

Being in your role

Given and taken roles

Consider the role you have been given, versus the role taken. The more overlap between these, the more effective you will be, and the more authority you will have. The following diagram is taken from an article by Krantz and Maltz (1997) which is interesting if you would like to read more about this area.

One's Role Enactment

Job Description

TAKEN

Authorisation

GIVEN

One's Role Ideal

Performance Measurement/ Evaluation

Job Responsibilities

One's Daily Task Routine

Other's Explicit and Expressed Expectations
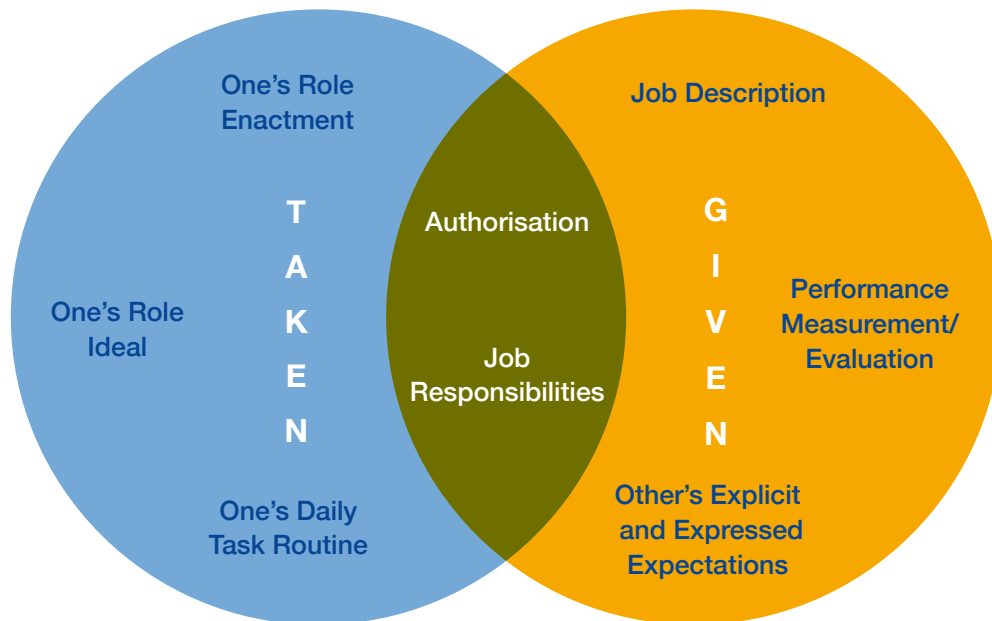
Diagram taken from Krantz & Maltz 1997, p144

Team effectiveness

How well you function within your committee is not entirely down to your own personal experience, style and skills. Your ability to function within your role will be highly impacted by the team or group effectiveness. You have the opportunity to positively impact the working of your group.

How do you know whether your group is effective or not?

Dyer (1995) outlines characteristics of effective groups in the context of temporary teams.

1. Goals and values are clear; they are understood and accepted by everyone. People are oriented to goals and results.

2. People understand their assignments and how their roles contribute to the work of the whole.

3. The basic climate is one of trust and support among members.

4. Communications are open. People are willing and have an opportunity to share all data relevant to the goals of the group and the organization.

5. People are allowed to participate in making decisions. They make free, informed decisions – not decisions they think the "power people" want.

6. Everyone implements decisions with commitment.

7. Leaders are supportive of others and have high personal performance standards.

8. Differences are recognized and handled, not ignored or brushed over lightly.

9. The group structure and procedures are consistent with the task, goals and people involved.

It can be useful to use a team effectiveness questionnaire but you need to consider the impact on the group and the readiness of the rest of the group to undertake such an exercise. A sample team effectiveness questionnaire is included below.

These aspects can form an agenda for areas for group development. For example:

1.   Goal setting

Are people clear about our goals?

If not, clarify goals of our unit for the next six months or next year.

2.   Strategic Planning

Where do we want to be in one, three or five years?

What do we need to do to get there?

3.   Expectations

What do we expect of others on the group?

What does each of us need from others to do our job better?

What are the manager's expectations of group members?

4.   Decision making

What are the important decisions being made?

Are all relevant people involved appropriately in decisions that affect them?

5.   Organisation and assignments

Do we feel that the unit is organized appropriately?

Do we all understand our organisation assignments and how they connect with others?

Are people carrying out their assignments effectively?

6.   Morale

What is the current level of morale in our unit?

How could it be improved?

Is there a climate of trust and support that everyone feels?

7.   Relations with other units

How well are we working with other departments?

8.   Communications

Are we communicating openly all of the information that will help each group member
and the group become more effective?

Team psychodynamics

Be aware that there are unconscious processes at work which can have as much or more impact as those visible on the surface. These unconscious dynamics may be experienced physically or psychologically, resulting in feeling uncomfortable. A helpful tip is to note your feelings on a page during a meeting (e.g. confused/frustrated/satisfied). This helps you to understand the group feelings and psychodynamics. It may also empower you to pose questions during meetings. This in turn helps you to find your own voice within a group.

Communication and engagement

Effective Representation on a national committee is not possible without communication on several levels. Good communication is key but can be complex in representative roles and there may not be a system in place to assist communication. Eliciting contributions from others can be challenging.

The representative must

- Know who you are representing.

- Listen to the people you are representing.

- Gain the trust of people you are representing.

- Create space and time for people to be involved/respond/feedback.

- Consider including consumer groups/patient/parent involvement.

- Communicate with people within and outside the group.

- Seek a support person from within your professional body.

- Use a variety of communication tools (phone, email, newsletters).

- Remember that people support what they help to create!

Time management

A common pitfall for groups can be the challenge of meeting deadlines. An effective representative will use several tools to manage and organise their time effectively

- Contracting – outlined above. This can happen during the role as well as prior to the taking up the role.

- Be realistic about expectations about time involved. "I can give x hours a week for xx weeks".

- Prioritise and stick to priorities.

- Have a strategic plan with long and short term goals

- Use Gantt Charts

- Record and disseminate deliverables and achievements

Action summaries

At times it can be unclear what the actions are from a meeting

As an effective representative, you can ask for a summary of:

- The meeting.

- Decisions made.

- Who is doing what.

Tips and tools for being on a group

Top tips in the role

1.	Be aware of your own strengths, weaknesses and blind spots. Be aware of your own and others styles.
2.	Be committed, brave and confident, ensure your voice is heard and realise your value to the group.
3.	Ensure you attend and participate as much as possible. However, it is alright to leave if you find that you cannot meet the expected commitments.
4.	Know what you have to do, identify the end point, use your 'no's' and protect your 'yes', and choose your battles!
5.	Support the Chair, actively listen, support diverse opinions.
6.	Ensure clarity of goals, terms of reference, procedures, recording methods, work within and outside of meetings.
7.	Create a space/ask to review how the group is functioning, what are we doing, how we work together, relevance to terms of reference.
8.	Ask basic and fundamental questions. Use being 'new' to your advantage and ask questions. You may be asking what everyone else is thinking.
9.	Build open communication, have a clear communication process before, during and after meetings and be clear on the who, where and timeframes.
10.	Build networks and connections, think laterally as well as up and down.
11.	Actively manage and deal with conflict. Be aware of hidden agendas.
12.	Find meaning for yourself and enjoy the role!

Section 3: Leaving the role

Leaving a role emerged as equally challenging as entering or performing in a role through the work with the participants.

Many people stay on for longer than planned due to difficulties recruiting new representatives and in other situations it can be difficult to give up a role, particularly where sufficient progress hasn't been made. Resilience was identified as a theme that enabled representatives to keep going in spite of challenges. Some people may experience a sense of bereavement or loss which needs to be acknowledged. A useful reference in relation to endings is *Managing Transitions: Making the Most of Change, William and Susan Bridges (2017).*

Things to consider

▶　Endings involve some form of loss and letting go.

▶　Finishing or ending involvement with a group requires planning for a successful and satisfactory outcome.

▶　Succession planning should be considered well in advance and should ideally be considered even from the beginning.

▶　Where a group hasn't a finite end point or the nominee knows they will be there for a specified time there should be a contract for the ending from the outset.

▶　Ending is a good time for reflection and learning for a group.

▶　Communication is important in this phase also, with the Chair, nominator, National Office and other key stakeholders to ensure a smooth transition.

▶　Leaving a group that is continuing is different from a group that is closing.

'difficult to leave, didn't know how to do it'

'worrying about what others might think'

'put under pressure by my manager to leave'

Some quotes from representatives on ending time on groups

'some felt the committee was let die and felt disappointed and sad and an urge to save it'

'I hated having to step down when I hadn't achieved what I thought I could'

'no sense of contribution'

Challenges

The following is a summary of the strong themes that emerged in terms of challenges faced at the end of a time on a group or the end of the group.

▶   Having an exit strategy.

▶   Getting a replacement so you can hand over.

▶   No succession plan.

▶   Pressure to remain.

▶   Leaving without a result having been achieved.

▶   Sense of loss.

▶   What are you giving up?

▶   Achieving a good handover.

Top tips and tools for exit

1.   Have a plan with a timeframe.

2.   know why you are leaving or why the group is ending, reflect on this, justify, and communicate to relevant stakeholders.

3.   Let the group know. Notify the chair first, do that face to face rather than by email.

4.   Acknowledge achievements and losses. Ask for an exit interview with the Chair.

5.   Let it go!

6.   Plan for handover preparation on to the next person and do so face to face if possible. Include both operational matters and some informal, personal feedback.

7.   Prepare the way for the new recruit at the last meeting you attend.

8.   Hold onto the network potential of the group.

9.   Stock take, take a break, make a plan and have closure.

10.   Celebrate and reward yourself!

What makes a good ending?

■   If the contracted piece of work is completed.

■   A planned ending, one that is contracted for if it is not the natural end of the group as a whole.

■   The timing of the ending, knowing the right time for you or for the group.

■   A seamless progression and good handover with appropriate overlap and relevant paperwork and underpinning documentation ready.

■   An induction/handover document to include up to date role details

      ▶   Role responsibilities, accountabilities and expectations

      ▶   Any relevant policies/guidelines

      ▶   Outline group arrangements

      ▶   Meeting formats, frequency

      ▶   Decision making processes

      ▶   Workflows

      ▶   Key contacts

      ▶   Itemisation of work completed, and work ongoing

      ▶   Highlight potential challenges

■   Provide the introduction of the person to relevant people/groups.

■   Having no regrets.

■   A personal and a group sense of achievement.

■   Having time for reflection and that the reflections can feed into conclusions and recommendation of the group.

■   No loose ends or loose ends identified and planned for.

Leaving a group that is continuing

■   Have clarity at the start regarding the timeframes and review dates for your work on the group.

■   Have a face to face handover if possible to include;

      ▶   Timeframe

      ▶   Information on the handover

      ▶   Procedure for leaving

      ▶   Roles and responsibilities (yours and others)

      ▶   Dynamics

      ▶   Useful contacts

■   Discuss the handover with the rest of the group at last meetings you attend and encourage and welcome information sharing.

Closing a group

- Review, have the goals been achieved, what was the groups function?

- Consider and talk about finishing together versus the group drifting on until everyone is eventually gone.

- Consider the best way to end.

- Give opportunity to others.

- End on a high note celebrating what was achieved.

Planning your ending – key personal questions to consider

1.	What will my losses be?
2.	What do I need to let go of?
3.	What will I bring with me?
4.	How will I mark the ending?

Appendix 1

Background to the Effective Representation Programme

The programme was developed as a result of collaboration between the National HSCP Office, INDI (on behalf of professional bodies) and the Head of Organisation Design and Development, HSE. The need for the programme and specific requirements arose from consultation and focus groups with those in representative roles and the professional bodies. Needs in this area had also emerged in the consultation and data collection that informed the HSCP Education and Development Strategy 2016-2019.

The programme was designed to support the goals of the HSE Corporate Plan and People Strategy as well as deliver on the HSCP Education and Development Strategy 2016-2019

- Goal 4 Corporate Plan

    - 'Engage, develop and value our workforce to deliver best possible care and services to the people who depend upon them'.

- People Strategy 1.5

    - 'Place particular emphasis on engaging clinicians and supporting them in leading change and quality improvement at all levels'

- HSCP Education and Development Strategy 2016-2019 **Priority 1 Visibility of Health and Social Care Professions –** 'The value of HSCP and their contribution to health and social care services and service user outcomes is better understood and maximised.'

Organisation Development Principles – Beckhard and Harris (1977)

- The basic units of change are groups, not individuals.

- The development of more collaborative working.

- Decision-making in a health organisation is located where the information sources are, rather than in a particular role or hierarchy.

- Organisations, sub-units of organisations and individuals continuously manage their affairs against goals.

- One goal of a health organisation is to develop open communication, mutual trust and confidence between and across levels.

- 'People support change they help to create'. People affected by a change must be allowed active participation and a sense of ownership in the planning and conduct of change.

The process for development of the programme is illustrated in the cycle of planned diagram outlined below which highlights the key steps. It is important to note that this is an iterative process and the programme continued to be tweaked and developed based on continuous feedback and the needs of the particular group.

The Cycle of Planned Change in Organisation Development

PHASE 1 - ENTRY AND CONTRACTING
Exploration & discussion
Agreement to proceed
Engagement with professions

Scouting

PHASE 2 – DIAGNOSIS
Identification of target group
Data from range of sources re needs
Focus group of HSCP reps on groups
Focus group of Professional Bodies
Common themes, points of difference

PHASE 3 - PLANNING & NEGOTIATING INTERVENTIONS
Analysis of data – core areas
Determine approach and learning methodologies
Outcomes
Criteria and application process
Detailed programme development

MAINSTREAMING
Become the template for future programmes
Associated outputs
Support mechanism

PHASE 4 - TAKING ACTION
Considered delivery options
Internal resource
Finalisation of design
Advertise, select participants, commence programme

PHASE 5
Evaluation

Termination

The cycle of planned change is used here to illustrate the development of the programme but can also be applied to consideration of taking up the representative role. It can be a useful model against which to consider the phases of entry to and working on a group in an iterative way. For example, the scouting phase could be when you are approached or apply in relation to taking up a representative role, the entry and contracting phase is the exploration and discussion about the role and requirements. The diagnostic phase is understanding the group, how it works, how decisions are made. The planning and negotiating phase is the stage of taking up the role in the group, with taking action being about the work, networks, who you are working with, what is being done and so on.

Appendix 2

Ground rules for contracting

- The responsibility for every relationship is 50/50. There are two sides to every story. There must be symmetry or the relationship will collapse. The contract has to be 50/50.

- The contract should be freely entered into.

- You can't get something for nothing. There must be consideration on both sides.

- All wants are legitimate.

- You can say no to what others want from you.

- You don't always get what you want.

- You can contract for behaviour; you can't contract for the other person to change their feelings.

- You can't ask for something the other person doesn't have.

- You can't promise something you don't have to deliver.

- You can't contract with someone who is not in the room, such as the client, other stakeholders etc. You have to meet them directly to know you have an agreement with them.

- Write down contracts when you can. Most are broken out of neglect, not intent.

- Contracts are always renegotiable. Contracts require specific time deadlines or duration.

Planning a Contracting Meeting

(In this context for 'client' think the person you are contracting with)

---

1. What imbalance do you expect in the responsibility for this project? Do you think the client will want to treat you as the expert and give you 80 percent of the responsibility? Or will the client treat you as a pair-of-hands and keep 80 percent of the responsibility?

---

2. What do you want from the client?

- What are your essential wants?

- What are your desirable wants?

---

3. What are you offering the client?

- Technically?

- Personally?

---

4. What do you think the client might want? List all possibilities.

- Technically?

- Personally?

---

5. Are the key clients going to be in the room? Are you contracting with the right person? Have promises been made already on your behalf?

- Who can make a decision on proceeding with this project?

- Who will be strongly affected by this project?

- Who is missing from the meeting?

- What are their roles? (For example, get some action on the problem started, actually implement the outcome of your consultation; they have the best information on the problem).

---

6. What resistance do you anticipate?

7.. What are the conditions under which it would be best not to proceed?

Taken from Flawless Consulting
Block 2000

Navigating the Contracting Meeting

```
                    ┌─────────────────────────┐
                    │  Personal               │
                    │  Acknowledgement        │
                    └─────────────────────────┘
                                │
                    ┌─────────────────────────┐
                    │  Communicate Understanding │
                    │  of the Problem         │
                    └─────────────────────────┘
                                │
                    ┌─────────────────────────┐
                    │  Client Wants and Offers │
                    └─────────────────────────┘
                                │
                    ┌─────────────────────────┐
                    │  Representative          │
                    │  Wants and Offers        │
                    └─────────────────────────┘
                    │                         │
        ┌───────────────────┐      ┌───────────────────────┐
        │  Agreement        │      │  Stuck on Wants and Offers │
        └───────────────────┘      └───────────────────────┘
                │                             │
        ┌───────────────────┐      ┌───────────────────────┐
        │  Ask for Feedback on │    │  Think/Recess         │
        │  Control and Commitment │  └───────────────────────┘
        └───────────────────┘                │
                │                   ┌───────────────────────┐
        ┌───────────────────┐      │  New Wants and Offers │
        │  Give Support     │      └───────────────────────┘
        └───────────────────┘                │
                │                   ┌───────────────────────┐
        ┌───────────────────┐      │  Stuck Again          │
        │  Restate Actions  │      └───────────────────────┘
        └───────────────────┘                │
                           ┌───────────────────────────┐
                           │  Process How We are        │
                           │  Handling this Discussion  │
                           └───────────────────────────┘

        ┌───────────────────────┐      ┌───────────────────────────┐
        │  Exchange Wants and Offers │  │  If Still Stuck – Terminate/ │
        └───────────────────────┘      │  Minimise Investment      │
                                       └───────────────────────────┘
```

from Flawless Consulting, Block 2000, Pp72

Reviewing the Contracting Meeting.

1.	How would you rate?	Client		Consultant
■	Balance of participation?	100%	50/50	100%
■	Who initiated?	100%	50/50	100%
■	Who had control?	100%	50/50	100

2. What resistance or reservations did the client express?

   ■   Which did you explore directly, in words, with the client?

   ■   Which did you not really explore?

3. What reservations do you have about the contract?

   ■   Which did you put into words with the client?

   ■   Which did you express indirectly or not at all?

4. How did you give support to the client?

5. How were the client's concerns expressed:

Silence? _____

Compliance? _____

Attack? _____

Questions? _____

Giving Answers? _____

Directly, in words? _____

6. What facial and body language did you observe?

7. How would you rate the client's motivation to proceed?

8. How would you rate your own motivation to proceed?

9. What didn't you express to the client?

10. Review "Navigating and Contracting Meeting" Did you skip any steps?

   ■   Which ones?

11. What would you do differently next time?

Taken from Flawless Consulting, Block 2000

Note: Pay attention to patterns emerging in your contracting conversations, for example, what do you avoid speaking about directly, when do you say 'yes' when really you are thinking 'no' etc.

Appendix 3

Role analysis and organisational role is another useful tool. Your ability to effectively represent will also be challenged or facilitated by issues around the role itself. The following checklist gives a structure to understand challenges which arise in a role which will guide reflection. Consider which elements you can change or influence:

REPRESENTATIVE ROLE CHECKLIST (adapted from Krantz and Maltz 1997)

	Factors That Impact On Taking Up Representative Toles	Check List		Comments/Evidence
		Yes	No	
1.	No clear mandate or direction			
2.	Difficulties in the role's configuration			
3.	Insufficient functional links to complementary roles			
4.	Multiple roles (perhaps conflicting) contained in a "single" role.			
5.	Changing demands on both the formal and informal aspects of the role			
6.	Further competency and/or skill development for the incumbent			
7.	Organizational and/or environmental issues that "spill over" into the role			
8.	Personal dilemmas, behaviours, and/or styles that make functioning in the role difficult			
9.	Other			
10.	Other			

The questions above will assist in thinking about the role and any challenges arising in taking up the representative role. A number of common issues are listed and there is space for additional items. It is useful to note the evidence you are basing your assessment on in the comment/evidence box.

Effective Representation

Leadership Support from National HSCP Office

Documentation to Support Pathway Implementation

- Nominee Selection Tools
- Professional Body Nomination Form
- HSE HSCP Representative Expression of Interest Form
- Role Requirements Checklist

Leadership Support from National HSCP Office

- Co-design and leadership support with implementation of the HSCP Representation Pathway
- Coaching services offered to support HSCP Representative in role
- Leadership support with establishment of HSCP Advisory Groups to support individual HSCP Representatives in role
- Briefing communication sent to stakeholders, advising on new process
- Effective Representation Toolkit
- Progress review at Consultative Workshop 2018
- On-going advocacy role

National HSCP Office

HSCP [Representative Role]
Expressions of Interest Form

Background
[Insert context and role details]

NOMINEE SELECTION
CRITERIA

[INSERT CRITERIA]

Completed nomination forms should be returned to [*insert name*] by 5pm on *[insert date].*

NOMINEE'S DETAILS AND APPLICATION

Name:

Statement by Nominee:
- **I agree to allow my name to go forward as a nomination for the above stated role**

- **I understand that if my nomination is approved, I will be the HSCP Representative and have to fulfil certain obligations**

Signature: **Date:**

Contact phone number: **Email address:**

Current position/job title:
CORU Registration Number (if applicable):

Place of work:

Interest/expertise in relevant area
(Please demonstrate evidence of meeting the criteria listed above)

NOMINEE'S DETAILS AND APPLICATION (CONT'D)

Publications/presentations:

Experience of [*insert relevant experience requirements*]:

Other information relevant to the application:

National Health and Social Care Professions Office

Role Requirements Checklist
_____

In order to ensure selection of a suitable nominee, who can fully commit to this representative role, we would appreciate you providing as much information as possible in the sections below.

Required Information	Comments
Name of the Group	
Purpose of the Group	
Chairperson/Lead of the Group	
Has there been HSCP involvement previously? If yes, please provide the name.	
What documentation is available to inform someone taking up the role?	
What is the proposed role of the HSCP representative?	

National Health and Social Care Professions Office

HSCP Representative:
Role Requirements Checklist

Required Information	Comments
What is the projected term for the HSCP representative?	
How frequently are meetings held?	
Where do the meetings take place and what is the expected duration of meetings?	
Is protected time agreed for attendance at meetings?	
Is there an agreed arrangement re travel and subsistence for meeting attendance?	
Is there a nominated contact person for any additional queries in relation to the Group?	

National HSCP Office

[HSCP Representative Nomination Form]

Background
[Insert context and role details]

NOMINEE SELECTION CRITERIA

[INSERT CRITERIA]

Completed nomination forms should be returned to [*insert name*] by 5pm on *[insert date].*

NOMINEE'S DETAILS AND APPLICATION

Name:

Statement by Nominee:
- **I agree to allow my name to go forward as a nomination for the above stated role**
- **I will remain a member of the Professional Body for the duration of the nomination**
- **I understand that if my nomination is approved, I will be the HSCP Representative and have to fulfil certain obligations**

Signature: **Date:**

Contact phone number: **Email address:**

Current position/job title:
CORU Registration Number (if applicable):

Place of work:

Interest/expertise in relevant area
(Please demonstrate evidence of meeting the criteria listed above)

NOMINEE'S DETAILS AND APPLICATION (CONT'D)

Publications/presentations:

Experience of *[insert relevant requirements]*:

Other information relevant to the application:

Professional Body Board Election

Date of Election

Voting option:

at meeting ☐

by email ☐

Elected: **Yes**   **No**

Email votes verified by:

Signature of Chairperson:

Name of member who will notify nominee:

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