



Leading management and
organisation development for
the health services

Annual Report 2003

Mission Statement

We contribute to a better health service by

- supporting people development
- stimulating change in the way things are done
- helping the whole system to improve

Introduction

This year is one in which health service reform has been to the forefront of the agenda for health service managers and policy makers. The Health Service Reform Programme was published by the Minister for Health and Children in June. The Office for Health Management (OHM) was invited by the Department of Health and Children (DoHC) to organise a major communication and consultation exercise with staff throughout the service over the summer: this resulted in a final report in the autumn.

The Health Service Reform Programme has major implications for the Office for Health Management itself. Under the programme, the OHM is to be mainstreamed into the Health Service Executive. As with the rest of the health service, we have been examining the implications of this for our work in the future. It is clear that the work of the OHM must continue but at an enhanced pace within a reformed health service as the need for personal, management and organisation development can only increase.

Given the major change pending for the OHM, it was deemed appropriate to conduct

a review of our operations in the seven years of our existence. Accordingly, the Office contacted Dr Alison Baker, one of the authors of *A Management Development Strategy for the Health and Personal Social Services in Ireland*, published in 1997, which had recommended the establishment of the OHM. Dr Baker was commissioned to ascertain to what extent the Office had fulfilled the remit proposed for it in the management development strategy and to make recommendations for its future work processes.

Baker concluded that the OHM had fully addressed its remit as intended in the management development strategy and that it had

done so in an impressive way. It has been concerned to deliver a shift towards a more accountable managerial culture in the Irish health services. OHM has given particular attention to the processes of managing learning, linking it with organisational needs and managers' career structures, creating awareness among opinion formers and leaders and supporting local change agents.

Phases in the Development of OHM

The role of the Office for Health Management has evolved since it was established. It first engaged in addressing services and activities identified as priorities in the management development strategy. These included services such as leadership programmes, a newsletter, and masterclasses.

The Office then began to respond to requests received from the health service itself. These were requests for follow-up development from masterclasses, for management development programmes for specific groups of staff, for involvement in the clinicians in management initiative and in nurse leadership development.

Finally, the Office for Health Management itself began to identify development needs that were not being addressed within the health system. It became apparent that managers within the system needed easily accessible development resources that would foster their development as managers. This led to the identification of management competencies and diagnostic tools, guidelines in preparing for interview, e-learning programmes and discussion papers. Other initiatives led by the Office included personal development planning, managing diversity, and executive coaching. In 2001 the role of the OHM was expanded, under the national health strategy *Quality and Fairness: a Health System for You*, to include responsibility for organisation development.

Our Way of Working

The Office's work programme is based on extensive consultation with its clients: consultative steering groups drawn from throughout the health services guide all of its strategic initiatives. A key part of our philosophy is to develop those with whom we work in such a way that the skills and expertise which we promote are disseminated throughout the system.

Our role is primarily to lead development, evaluate progress and ensure that quality is maintained. The Office acts like an advance unit that surveys what lies ahead and reports back to the service, a role that enables it then to develop and adapt in the light of probable future change. We are increasingly placing emphasis on leading the way as opposed to simply meeting current needs. When working with groups we seek to enable them to address development issues themselves, in collaboration with the Office acting as advisor and consultant rather than 'doer'.

The role of the Office is therefore primarily a facilitative one, to commission management and organisation development programmes on behalf of employers in the health and personal social services. Employers have primary responsibility for management and organisation development and the Office intervenes only when a gap is identified in existing service provision or when a programme needs to be implemented across the health services rather than within an individual organisation. The Office may however actively support development initiatives by individual employers when such initiatives are felt to be of interest to the service as a whole as demonstration

projects. It also seeks to identify and promote best practice in service delivery.

The staff complement of the Office is small, deliberately so because our policy is to call on people employed in the health services to participate in projects, steering committees and development programmes. This has a dual benefit: it ensures that we are in constant touch with the needs of health service managers and the issues that confront them, and it provides an opportunity for health service managers to reflect on developmental issues that relate to the service as a whole.

Many of the Office's commissioned programmes are run in locations around the country. This is to ensure outreach to the regions beyond Dublin and also to minimise and equalise participants' travel costs to some extent across the regions.

Alison Baker comments as follows on the OHM way of working.

This style of work requires a relationship of trust between the OHM and the groups and organisations with which it works. The OHM attaches considerable importance to being seen as impartial and being able to take an unbiased, overarching view of what will best improve services to patients and clients. This style of work has enabled OHM to develop excellent relationships with employers, unions and professional bodies and to secure support for development initiatives across a wide range of stakeholders.

She also has a word of caution.

The main issue confronting OHM now is probably that of the spread and sustainability of its projects and how to make a wider impact across the health system. In its early years OHM has sought out managers who are receptive to change and worked closely with them. This was a valid and appropriate way of initiating change. Now, however, is the time to consider the next phase of managing change. Observers suggested that the most effective way of doing this would be to rebalance its portfolio of work towards organisations as clients rather than programmes for individual managers. It was suggested that to do this OHM needed to focus on a smaller number of practical organisational interventions.

It is recommended that OHM develops a coherent strategy for working more closely with organisations, following up activities over time and ensuring its networks include those who are near the front line of service delivery as well as the most senior managers. This may involve a different style of working and a review of the skills, which OHM can draw on within its own staff and within its partner organisations.

The OHM will be considering the above recommendations, in consultation with our main stakeholders, during 2004.

Consultations

As in previous years, close contact was maintained with all our stakeholders.

Consultative Group

Our consultative group comprises representatives of all health service employers (see appendix for group membership). During 2003 the group met four times to review the operation and future plans of the Office. These meetings focused, in addition, on topics such as the implications of the Action Plan for People Management, personal development planning and the impact of the initiatives on nurse leadership and management development.

Department of Health and Children

Meetings were held during the year to present and review the Office's service plan and to discuss potential new development initiatives.

Health Service Employers Agency

Discussions were held during the year with senior officials of the Health Service Employers Agency (HSEA) on matters of mutual interest, particularly the management of diversity and equal opportunities. The OHM was also represented on the HSEA working group on the introduction of a team-based performance management system.

Trades Unions

Contacts were maintained during the year with senior officials of the main trades unions.

CEOs of Health Boards and Voluntary Hospitals

Consultations continued with the chief executive officers of the health boards and the voluntary hospitals.

Awareness of OHM in Health Service

During the year the Health Services National Partnership Forum conducted a sample survey of all staff in the health services. Respondents were asked if they had heard of the Office for Health Management. Almost half (46%) had done so, a finding which would indicate a relatively high level of awareness in the service, given that much of the OHM work is targeted at the managers within the service. They were also asked which OHM services they had heard of and their responses were as follows.

Newsletter	20%
Website	14%
Publications	14%
Management development	14%
Leadership development	12%
Personal development	11%
Organisation development	8%
Masterclasses	7%
Total	100%

Activities in 2003

The work of the OHM can be divided into three main types of activities, personal development, management development and organisation development.



Personal Development

The Office provides specialist programmes, assessment and diagnostic tools and other professional resources to managers throughout the health services to enable them to develop their leadership skills and competencies. As a key part of our work we seek always to foster recognition among managers of their responsibility to develop themselves and their staff continuously. Central to our work on personal development in 2003 was the identification and dissemination of management competencies and our tools to facilitate personal development planning.

Management Competencies

Management competency frameworks for managers in the health and social care professions and for clerical/administrative managerial grades were formally launched in June. This followed a lengthy period of research and consultation with staff throughout the health services to ensure the validity of the competencies. The Office commissioned user packs relating to the competency frameworks which it distributed to local HR departments for circulation to staff. An online assessment tool was also developed for the frameworks and is available on the Office's website along with the full report, encompassing the technical details of the research as well as both sets of competencies.

The management competency frameworks represent the first comprehensive, research-

based definition of the skills and attributes of effective managers within the service. Although developed primarily to assist staff training, they can also be adapted for use in recruitment, selection and performance management. They have been developed as a result of effective collaborative working between union and management representatives on the steering group for the project.

A comprehensive implementation plan for the competency frameworks (incorporating personal development planning) was agreed by the steering group and put in place. Briefing sessions were commissioned by the Office for Health Management early in the summer to communicate information and raise awareness about the frameworks throughout the system. In the autumn the Office provided workshops for implementation personnel from all health agencies.

Towards the end of the year, we commissioned the design of a development programme for line managers on people management, incorporating the competency and personal development planning tools. The Office plans to develop a template for the programme, in collaboration with the HSEA, and then hand it over to employers to be delivered and organised locally.

A development directory covering each of the competency sub-headings has also been commissioned. The steering group – comprising unions, management and OHM representatives (see appendix) – will monitor the roll-out of the implementation and undertake such evaluation as is deemed appropriate.

Personal Development Planning

Interactive online personal development planning guidelines and an online workbook were launched in June 2003 and are also available in hard-copy format. The OHM is continuing to promote personal development planning (PDP) among health service employees. PDP is a continuous development process that enables people to make the best use of their skills and helps advance both the individual's plans and the strategic goals of the organisation. Our goal is that every staff member will eventually be working to a personal development plan. Among the benefits of this initiative are a greater fit between personal development and organisational development and increased dialogue between line managers and their staff on development issues.

Development of Online Knowledge Centre and Website

With close to 100,000 staff members in the health services, spread around the country, we are increasingly refining and expanding our website in order to disseminate information to health service managers. The website contains a digest of the latest health management news, a calendar of OHM events and activities, copies of newsletters, published reports and documents, papers and resource materials from OHM masterclasses and other events. The website was developed further during 2003 to provide more information and make it more readily accessible to health service staff.

Statistics for our website show a marked

increase in usage for 2003. Pages downloaded from the site increased by over 300% during the year. Several health boards who do not allow Internet access for their staff began mirroring our website on their local intranets. Through this initiative the resources and information provided on our comprehensive website are now available to an even wider audience within the Irish health service.

Knowledge Centre

The Knowledge Centre on the website is a compendium of resource material relating to personal, management and organisation development designed to enable health service managers to access the latest management thinking and tools in these areas. We aim to ensure that managers, in all parts of the country, can have relevant and easily accessible material on the Internet relating to personal development.

There were approximately 1500 users of the Knowledge Centre in 2003, who downloaded 28,268 articles. This was an increase in usage of 300% from 2002. The breakdown of users in 2003 can be seen in the following table.

Organisation	Percentage of users
ERHA and Area Health Boards	21%
Other	17%
Other voluntary hospitals	13%
Other health agencies	9%
Southern Health Board	8%
DATHs	7%
North Eastern Health Board	6%
Western Health Board	6%
North Western Health Board	5%
Mid Western Health Board	4%
South Eastern Health Board	2%
Midland Health Board	2%
Total	100%

Towards the end of the year steps were taken to limit access to the Knowledge Centre to employees of the Irish health service only.

Learning and Self Discovery Centre

The Learning and Self Discovery Centre, another element of our website, was launched in June 2003 to provide interactive online learning and professional development resources. It can provide significant assistance to over 12,000 health service managers within the administrative, nursing and health and social care professional grades in developing their own personal skills and attributes. The Centre was acknowledged as a major new online initiative and among the top human resource projects in the country, at an awards ceremony this year. Organised by the Chartered Institute of Personnel and Development, the awards were sponsored by *Irish Independent* and Watson Wyatt.

Managers can now log on to our website and assess their managerial performance using the management competency templates already developed. They can also invite their colleagues to complete the same rating scales from their perspective. In this way they can get a free, confidential 360-degree assessment of their managerial performance. From that information they can then use the online tools and resources to prepare a personal development plan to discuss and agree with their line manager.

The Learning and Self Discovery Centre also contains two stand-alone e-learning initiatives, 'Introduction to Service Planning in the Health Services' and 'Financial Management in the Health Services for Non-Financial Managers'.

The Office for Health Management co-funded the service planning online development tool with the North Western Health Board, which piloted the initiative. The first module, 'Setting the Context of Service Planning', was completed and evaluated throughout the health services in 2002. It was launched formally in June 2003. The project has now moved into its second phase of development and a module under the working title 'Communications' will offer seven hours online learning. It is expected that this module will be available in the second half of 2004 (<http://elearning.tohm.ie/>).

National e-Learning Project Team

The OHM continues to explore ways and means of developing and providing more electronic knowledge and learning resources for health services employers and their staff. Our research in 2002 indicated variable accessibility and user IT literacy skills amongst health service staff.

In line with Action 5.3.2 of the Action Plan for People Management, the Office for Health Management established a national e-learning project team during the year to further develop the potential for e learning in the health service. The project team comprises nominees from the health boards, voluntary hospitals and the National Federation of Voluntary Bodies. The team met in late 2003 and has initially sought to ascertain the current status of e-learning within the health sector.

Provider Database

The Office provides human resource personnel and health service staff with information on the range of courses and programmes available on management and organisation development through the provider database on its website. At the end of 2003, there were sixty-five providers registered on the database. Each of the providers has a full profile on its organisation together with details of courses and programmes. In 2003 information on 196 courses was available. Providers themselves update the data provided.

Nursing Management Competency Framework

Towards the latter part of 2003 the Office commissioned the redesign of its 2000 publication, entitled *Report on Nursing Management Competencies*, with the aim of bringing the publication in line with the design and format of the user packs launched during the year for the health and social care professions and for clerical/administrative managerial grades. This work will continue into 2004.

Mentoring Programmes

The OHM and health service employers commenced pilot mentoring programmes in 2001 in the East Coast Area, Mid-Western, North Eastern and North Western Health Boards, and the Mater and Beaumont hospitals. The pilot programmes concluded and were evaluated by the Office in 2002. A report on the pilot programmes and the lessons learnt, entitled *Spotlight on Mentoring*, was published in 2003. This report will provide guidance for other organisations wishing to develop mentoring programmes.

Publications

Newsletters

The OHM newsletter was published seven times during the year. This included a special edition on the Communication and Consultation Process in relation to the Health Service Programme, undertaken by the Office on behalf of the Department of Health and Children (DoHC). Each edition of the newsletter has a print order of 13,000 copies and these are circulated throughout the health services. Our aim is that every staff member with management and supervisory responsibility receives a copy of the newsletter. Distribution is through employers or directly via our extensive mailing list of individual employees. The newsletter is also available on the OHM website.

In addition, a monthly electronic 'e-zine' is circulated via our electronic mailing list. It contains the latest news and events from the OHM and directs readers to OHM publications and features on our website.

Other Publications

When we identify a gap in resource materials available to health service managers we immediately move to fill it. A full list of Office for Health Management publications is contained in the appendix.

During 2003, the following titles were published.

- Modernising Staff Rostering: An Imperative for Progress – A Facilitator's Guide to Running a Workshop
- Dialogue on Implementing Reform – Communication and Consultation Programme: July-Sep 2003 (available online)
- Clinicians in Management: A Review of Clinical Leadership – Discussion Paper 4

- Clinicians in Management at Work in Mayo General Hospital: Choices in CIM – Discussion Paper 5
- Report on an Evaluation Study of the Leading an Empowered Organisation Programme (LEO) for Clinical Nurse Managers 1
- Report on the Diagnostic Exercise for Directors of Nursing/Equivalent Nursing Management Grades
- Good Practice in Leading and Managing Change in Health Service Organisations: 11 Case Studies
- Learning from the NHS in Change: A study on the management of major structural change in the NHS
- Personal Development Planning: Guidelines and Workbook
- Management Competency User Pack for Managers of Health and Social Care Professions
- Management Competency User Pack for Clerical/Administrative Grades IV to Senior Management
- Management Competency Frameworks for Health and Social Care Professions and Clerical/Administrative Grades IV to Senior Management inclusive: Technical Report (available online)
- Spotlight on Mentoring: Evaluation of Pilot Programme and Guidelines for the Future

Over 13,000 copies of our publications were distributed in hard copy in 2003, a high percentage of this figure following direct requests to the Office. Health services staff members are also encouraged to download OHM publications from our website.

Management Development

Our management development work comprises

- leadership programmes
- development programmes for top and senior managers
- management development programmes commissioned for specific groups
- masterclasses and lectures.

Leadership Development Programmes

From Strategy to Action

The third in the series of leadership development programmes, 'From Strategy to Action', commenced in autumn 2003 with twenty-seven participants from diverse health service backgrounds. The providers chosen for this programme comprise a partnership between the Beeches Management Institute and the Centre for Creative Leadership, Europe. Following the evaluation of the previous programmes, stronger emphasis has been placed on the role and input of chief executives to the participants' action project.

The average gender breakdown of participants on these programmes since they commenced in 1998 is 23 % male and 77% female – broadly in line with the overall gender balance in health services staff.

Modernising the Health Services – The Leadership Challenge

In November the Office advertised the fourth in its series of leadership development programmes, which will commence in October 2004.

Executive Coaching

Initiatives to support the development of top and senior health service managers are a priority for the OHM. These managers act as important role models for staff and, in effect, determine the culture of the organisation.

Following a process of consultation, discussion and needs identification, a programme of executive coaching for top and senior managers within the health and personal social services commenced in 2000. The programme consists of ten one-to-one coaching sessions conducted by a professional coach chosen from a panel nominated by the Office. As a result of an evaluation conducted, which was extremely positive, the OHM continues the programme and provides quality assurance for it.

During 2003, thirty senior managers were nominated to participate in the executive coaching programme. Seventeen of these followed through by working with a coach over the year. It is planned to offer the programme once again in 2004 when it is envisaged there will be an increased uptake due to the impact of the Health Service Reform Programme on career planning for many senior managers.

Commissioned Management Development Programmes

A large part of the Office's work programme entails the commissioning of management development programmes for specific groups of staff at the request of employers. We outline below the main programmes commissioned in this way in 2003.

General Managers Community Services – Development Programme

The General Managers Community Services group requested ongoing development, and this was facilitated by the OHM during 2003 with a workshop. Topics covered included the Health Services Reform Programme and the Primary Care Strategy.

Front-Line Supervisors Programme

Following the feedback received on this programme commissioned by the Office and delivered by the University of Limerick, the Office continues to offer the programme to health agencies, quite a number of which, during 2003, have expressed an interest in having their own staff trained in its delivery. Arrangements are in place for this to occur in the first half of 2004.

Medical Manpower Managers

The Office has discussed with this group its training and development needs following a diagnostic exercise it arranged for the group in September 2002. Arising from this exercise the Office commissioned a programme to meet these needs which was delivered in three modules in the autumn of 2003. Work will continue with the group in 2004.

Nursing Management Development Programmes and Initiatives

Through our participation on the 'Empowerment of Nurses and Midwives High Level Steering Group – An Agenda for Change' the Office has been involved since 2000 in management development initiatives for front-line, middle-level and top-level nursing management. The work in this regard continued during 2003 with the initiative for Clinical Nurse Managers 1 resulting in the publication of *Report on an Evaluation Study of the Leading an Empowered Organisation Programme (LEO) for Clinical Nurse Managers 1*. The main focus during the year was concentrated on continuing diagnostic exercises (nine in total were held) for the various groups of directors of nursing/equivalent nursing management grades in order to identify their leadership and management development needs. A feedback seminar on the findings was held and a framework for addressing development needs was drawn up. Both the framework and the findings from the diagnostic exercises were published in autumn 2003 in *Report on the Diagnostic Exercise for Directors of Nursing/Equivalent Nursing Management Grades*.

Subsequently, in October, the King's Fund, London, was commissioned to deliver pilot introductory development modules for two groups of directors of nursing/equivalent nursing management grades, entitled *Understanding and Managing Self*. An independent evaluation by University College Dublin will continue into early 2004.

Over the last three years, an estimated 10% of nurse/midwife managers from the Irish health system have participated in pilot development interventions under the nursing management development initiative alone,

i.e. masterclasses, workshops and programmes. A further breakdown of this figure indicates that approximately 20% of top/senior nursing and midwifery managers, 13% of middle nurse/midwife managers and 4% of front-line nurse/midwife managers were sponsored on pilot management development programmes for their respective level of nursing/midwifery management since the Steering Group was set up. The Office will continue to work on the development of the management and leadership skills of nurse/midwife managers in collaboration with the Regional Nursing and Midwifery Planning and Development Units, based on the learning from these pilot programmes

Modernising Staff Rostering

An innovative facilitator's guide for running a workshop on modernising staff rostering at an introductory and advanced level was launched by the Office in December 2003. The publication, entitled *Modernising Staff Rostering: An Imperative for Progress*, provides support to organisations and individuals wishing to implement best practice in the rostering of staff. The project was undertaken with the assistance of the North Western Health Board, Western Health Board and the Centre for the Development of Nursing Policy and Practice, University of Leeds. During 2004 the Office will facilitate the roll-out of this initiative by providing additional support to local facilitators who will deliver the programme locally. The facilitator's guide is available on the OHM website.

Masterclasses and Lectures

During 2003 the Office provided five events under this banner: four masterclasses and the annual Maureen Dixon Memorial Lecture. The total attendance at these events was 814, made up of health service managers and clinical leaders from predominantly middle-level and top-level grades, and the average gender breakdown was 37% male and 63% female.

Andrew Foster

Andrew Foster is the Director of Human Resources at the Department of Health in the UK. His key responsibilities include achieving major increases in NHS workforce capacity; improving the working lives of NHS staff; regulation; education, training and development. Previously he was an NHS Trust Chair and Policy Director (HR), NHS Confederation. He has had a number of other roles in the NHS, locally and regionally.

At the masterclass, entitled 'How can good Human Resource Management improve patient experiences?', he spoke of the key challenge presented by the Human Resources Plan in the National Health Service. The Human Resources Plan builds on the commitments set out in the National Health Services Plan, a ten-year reform programme that was published in July 2000. The aim of the Human Resources Plan is that the National Health Service becomes the employer of choice and offers a model career to staff.

Jan Sobieraj

Jan Sobieraj is Chief Executive of Barnsley District General Hospital NHS Trust. He is well known within the NHS for his pioneering and innovative approaches to leading change and has been instrumental in modernising health and social care across Barnsley and South Yorkshire. Jan worked in the public and private sectors before joining the NHS in 1991.

At this masterclass, Jan spoke about the constant challenge of delivering services on a day-to-day basis and at the same time preparing for and building the capacity to cope with change in the future. The public is becoming ever more demanding and expects to see continuous improvement in service provision. It is no longer acceptable to aim for day-to-day survival and public organisations have a responsibility to aim for continuous improvement on all fronts.

Professor Mike West

Mike West is Professor of Organisational Psychology and Director of Research at Aston Business School. He has been a member of the Centre for Economic Performance at the London School of Economics since 1991. Professor West has written and co-edited fourteen books and over one hundred papers for scientific and practitioner publications. His areas of research interest are team and organisational innovation and effectiveness, particularly in relation to the organisation of health services.

During his masterclass, entitled 'Radical Teamwork – the Route to Best Patient Care in the Health Services', he spoke about creating effective and innovative teams as a mechanism to reduce patient mortality and increase productivity.

Laraine Kaminsky

Laraine Kaminsky, founder and President of MALKAM Cross-Cultural Training in Canada, is a recognised leader in the fields of diversity, cross-cultural awareness, employment equity and mentoring training and consulting. She has trained, consulted with and presented to various audiences across six continents. Laraine, who was born in South Africa, developed a keen interest in and perspective on diversity issues due to her experiences and knowledge of apartheid.

This masterclass focused on understanding diversity and valuing difference in the healthcare team, breaking down the barriers that impede competent care giving and going beyond compliance to commitment in fulfilling the Irish equality legislation requirements.

Annual Maureen Dixon Memorial Lecture

The fifth Annual Maureen Dixon lecture was delivered by Dr Jo Ivey Boufford MD, who is currently a Clinical Professor of Paediatrics at New York University School of Medicine and is also Professor of Public Service, Health Policy and Management at Robert F. Wagner Graduate School of Public Service. She served as Dean of the Graduate School of Public Service at New York University for five years. She also served as Principal Deputy Assistant Secretary for Health in the United States Department of Health and Human Services. Whilst there, she was the US representative on the executive board of the World Health Organisation. Dr Boufford served as Director of the King's Fund College, London, and President of the New York City Health and Hospitals Corporation, the largest municipal system in the United States. She was a member of the National

Council on Graduate Medical Education and is currently a member of the National Advisory Council for the Agency for Healthcare Research and Quality.

In her lecture, addressing the theme 'A Health Policy that Promotes Health', Dr Boufford acknowledged that the 'perennial and universal' concern for health sector leaders, particularly in the US where her experience lay, was cost. She, however, dealt with a deeper concern – the achievement of 'a health policy that promotes health'. In addressing this concern she questioned with her audience 'the nature and outcomes of our overall investments for health – are they well placed, and if not, why not?'

Organisation Development

Health Service Reform Programme – Communication and Consultation Process

In June 2003 the government announced the Health Service Reform Programme, initiating an era of unprecedented change in the health system. The Department of Health and Children (DoHC) requested the Office for Health Management to conduct a communication and consultation programme with staff throughout the health services. The DoHC was concerned that the purpose and content of the proposed reforms should be communicated clearly to all staff, that staff would have an opportunity to raise their concerns and that they would be consulted on how the reforms should be implemented.

The OHM convened thirteen workshops for top and senior managers from across the service in July and August. Almost 300 managers participated in these workshops. For other staff within the health service, employers themselves organised the consultation process using OHM guidelines and templates.

The Office produced a full report on the results of the consultation process, which was submitted to the DoHC in October. The reactions of staff to the reforms were broadly positive. Staff recognised that the system was in need of reform and while they had some uncertainty about why these particular reforms had been chosen, they clearly felt that the time was now right for change in the system and they wanted swift movement forward in implementation.

The attitudes of staff towards the Health Service Reform Programme became progressively more positive as they felt they were being communicated with and consulted, had a chance to discuss the proposed changes and to think through the implications for themselves. There was a widespread demand for continuing communication and consultation.

The Office published some of the main findings of the process and the DoHC's response in a special edition of its newsletter in December.

Publications on Change Management

In recognition of the likelihood of major structural reform of the health services on a scale unprecedented in the last thirty years, the OHM commissioned two research studies to provide guidance in the change management process.

The first, entitled *Good Practice in Leading and Managing Change in Health Service Organisations*, compiled by Hilary Maher of Lime Tree Consulting, examined eleven case studies across the Irish health service. From these case studies, the factors contributing to effective change implementation were identified:

- 1 a clear and common vision/inspiration about how things can be better
- 2 communication and consultation – throughout the change
- 3 securing appropriate top management support
- 4 empowering others to act on the vision/effect the change
- 5 communication and consultation – in advance of the change.

The second study, prepared by the Office for Public Management in the UK, was entitled *Learning from the NHS in Change*. It sought to identify the lessons to be learnt from the management of major structural change in the UK health service. It concluded with recommendations on the support of strategic change, the development of the capacity within the system to support change and the development of the infrastructure to support change.

Both of these publications were circulated to top managers and policy makers within the health sector and are also available on our website.

Clinicians in Management

The Clinicians in Management (CIM) initiative endeavours to give health professionals a greater say in the planning and management of health services. The OHM plays a central role in supporting this initiative through a number of activities aimed at facilitating health agencies in the change process.

Leadership Programme for Senior and Specialist Registrars

The Office for Health Management, in consultation with the DoHC and the Irish Medical Organisation, commissioned three leadership/management development programmes. The programmes were designed to facilitate doctors who had completed or almost completed their specialist training, and hence were on the verge of becoming consultants, to perceive a new role for themselves as participative clinical leaders within the health services. There was a very high demand for participation, and evaluative feedback has been positive.

Clinicians in Management:

Discussion Papers

The Office commissioned two further discussion papers during 2003. *Clinicians in Management: A Review of Clinical Leadership – Discussion Paper 4* explores hospital doctors' attitudes to taking on leadership and management roles in their organisations.

Clinicians in Management: CIM at Work in Mayo General Hospital – Discussion Paper 5 reviews the introduction of a pilot CIM initiative at one particular location. It describes the approach to implementation, explores the issues arising and outlines the critical success factors.

Project Leaders Group

The Office organised and provided action-learning sets for project leaders with responsibility for CIM on the subject of implementing CIM. The leaders will continue to meet during 2004.

Doctors and Managers

Discussion Group

In 2003, the Office convened a small discussion group of hospital consultants and senior managers as a mechanism for increased co-operation between hospital management and consultant staff. Group members expressed an interest in working together to agree ways in which this increased co-operation might be accomplished. The group focused on the goal of increasing co-operation between doctors and managers at both local hospital and national decision-making level: this will involve building a framework for effective working partnerships. The group met on two occasions in 2003 and will continue to meet periodically during 2004.

Public and Patient Partnership in Healthcare

The Office's discussion paper on public and patient participation in healthcare was launched at a national conference at the end of last year. During 2003, Office staff presented papers on this discussion paper at conferences in Ireland and to NHS Modernisation Agency Associates at their national conference in the UK.

Next year, the OHM will explore possibilities for piloting and customising for the Irish context the materials in a guide entitled *Signposts Two* published by the UK's Office for Public Management (OPM) to help NHS organisations in Wales. A diagnostic/self-evaluation tool to help organisations assess performance, strategy development and planning in public and patient participation is included in this UK guide.

Quality and Fairness: Making Change Happen – Change Facilitation Development Programmes

Throughout the year the Office for Health Management has been working with three health boards – South Eastern, North Eastern and the South Western Area – to help employers throughout the health system to concentrate on how to manage and implement the change agenda outlined in the new national health strategy in their respective organisations. The change agenda in *Quality and Fairness: A Health System for You* requires support from people within the system who have change facilitation or organisation development skills. Some of this support could be achieved with internal,

trained change facilitators who are developed and skilled in promoting change management at a local level.

Three programmes, entitled 'Quality and Fairness: Making Change Happen', were commissioned from Savage Young and Associates Limited and initially launched in December 2002. The programmes have been ongoing throughout 2003 and will come to a close at the beginning of 2004. An independent external evaluation of this initiative has been commissioned from Pearn Kandola and the findings will be available in spring 2004.

This initiative was also supported by a password protected discussion forum on the Office's website, designed to assist programme participants in e-networking and exchanging ideas for the duration of the programme.

HRM Development

Throughout 2003 the Office continued to work with the Department of Health and Children, health service employers and a variety of national steering groups, to implement the Action Plan for People Management in the Health Service (APPM) which was launched in November 2002.

The Office continued to work closely with senior human resource and training personnel to develop and enrich the HR function. The Office also supported health board HR directors in progressing the practice of conjoint working across the boards.

The Learning and Development Needs Analysis Toolkit, developed in 2002, was pilot tested in a number of organisations in

2003. Following evaluation of the pilots the toolkit was revised and is ready to be rolled out to the wider service in 2004.

Primary Care Strategy

The Office was invited to advise and support the DoHC in the implementation of the primary care strategy. It worked with the DoHC during 2003 on local implementation projects and a number of initiatives were undertaken.

Nomination of Liaison People

A meeting of senior managers involved in primary care was held in April and feedback from participants suggested that 'representatives' from the group be involved in the design and content of proposed OHM team development initiatives. Health Board CEOs nominated liaison persons who are senior managers directly involved with the implementation team. The liaison persons are responsible for communicating developments, initiatives and information to the team, they identify key people needed to participate in various initiatives and consultation, and assist the OHM by monitoring progress, giving feedback and evaluating the support initiatives.

This group met in September and recommended that the OHM host quarterly meetings of liaison and key persons in order to discuss current issues, and foster communications and networking between the implementation teams.

Development Workshop with Liaison People and Project Managers of Primary Care Implementation Projects

A workshop for liaison people and project managers was held in October to report feedback from each of the implementation teams and to address specific policy issues. The Beeches Management Centre met separately with project managers to discuss the design of a training and development programme specific to their needs. This programme commences in January 2004.

General Practitioner Workshop

As a result of discussion with the Irish College of General Practitioners (ICGP) and the DoHC, the Office for Health Management organised a workshop for the GPs involved in the implementation teams. The purpose of the workshop was twofold: firstly to engage GPs in discussion on the issues and challenges facing them with implementation and provide them with an opportunity to network with colleagues and secondly to explore ways in which the Office could support them. There was a final plenary session with representatives from the Primary Care Task Force and the ICGP. The GPs recommended that the OHM convene a biannual meeting to facilitate their networking and information sharing.

Implementation team visits

During the year, OHM staff visited a number of the implementation teams with a view to getting information on their current status, the issues they face and their development needs. These visits will continue in early 2004. The information will then be used to guide the Office in supporting the teams and in the provision of facilitation during 2004.

Managing Diversity and Equal Opportunities

In 2003, the Office continued to liaise with the Health Services Employers Agency (HSEA) in regard to assisting managers in meeting their obligations under equality legislation and the equal opportunities/diversity aspects of their people management role. Networking opportunities with similar cross-border initiatives – for example Opportunity Now in HPSS, Northern Ireland – and international best practice in this regard were also explored during the year.

Women's Regional Networks

The Office continued to provide support and advice to the women's regional networks during 2003 and two meetings were held with network representatives – one in January and the other in October. As part of the latter, a facilitated development workshop entitled 'Influencing policy, process and people' was commissioned and organised in response to a system request to provide such an event.

Seminar for Senior Women

A two-day seminar entitled 'Leadership within a Changing Professional Environment' was held in April. The event targeted senior women and was designed to provide participants with the opportunity to develop their influencing strategies within an increasingly complex work environment. The King's Fund, London, led the seminar and guest speakers from Ireland and the UK also contributed.

When in 1997 the OHM was originally established, 75% of health service employees comprised women but only 19% of them were represented in top management team positions. The 2003 health service census statistics indicate that there has been a significant change since then with 36% of senior management team posts now filled by women. Women now comprise almost 80% of health service staff.

OD Network

For several years the OHM has been supporting a network of people throughout the health service who are working in organisation development (OD) and change management. The OHM funds professional facilitation for the group, as required. The group meets quarterly and shares learning and intelligence on OD approaches.

Other Activities

Central Resource

The Office for Health Management acts as a central resource on personal and management development for the health services. Queries are received from managers and employers daily on development activities and resources available. Office staff are actively involved in advising employers and their staff on development issues.

OHM staff sit on interview boards for health service management posts advertised by the Local Appointments Commission or by local employers.

The Office influences national policy on management and organisation development issues through its participation in national groups. Staff were members of the following groups in 2002.

- National Steering Group for the Action Plan for People Management in the health services
- National Steering Group for a Health Service Performance Management System
- High Level Steering Group on Empowerment of Nurses and Midwives
- Administrative Resources Review Group
- eGovernment Project Team
- Medical Recruitment and Retention Group
- National Council on Ageing and Older People, Care Management Consultative Committee
- Irish Nursing Research Interest Group

- Health Research Board Advisory Committee for Nursing and Midwifery Research/Fellowships
- Advisory Group for Belfast City Hospital, St James's Hospital, Dublin, and the University of Ulster Collaborative Leadership Development for clinical nurse leaders in oncology and haematology services
- Inquiry into the Handling of Allegations of Clerical Sexual Abuse in the Diocese of Ferns.

Presentations

Presentations were made during the year by OHM staff on topics such as the role and work of the Office for Health Management, personal development planning, performance management, management development, nurse empowerment and the clinicians in management initiative. These presentations were made at national and international conferences and other events to varied professional groups.

APPENDIX

Members of Office for Health Management Staff

Director: Denis Doherty

Deputy Director: Laraine Joyce

General Manager: Alan Smith

Development Specialists: Ann Judge, Jacqueline Crinion, Caroline O'Regan, Tina Joyce

Management Services Officer: Rena Dooley

Administrative Assistants: Sinead Farrell, Grainne Hunt, Susan Keegan, Ruth Fuller

Information Specialist (part time): Pat Smyth

Information Specialist (part time): Dearbhla Casey

Members of Consultative Group

Larry Bane, Director of Human Resources, Midland Health Board

Michele Bermingham, Corporate Learning and Development Officer, Southern Health Board

Lorcan Birthistle, Chief Executive Officer, St Luke's Hospital

Noel Cassidy, Personnel Officer, St Vincent's Hospital, Elm Park

Pearse Costello, Director of Human Resources, East Coast Area Health Board

Mary Crowe, Human Resources Manager, Mater Hospital

D'Arcy Donnelly, Human Resources Manager, Cheshire Ireland

Rose Doyle, Corporate Learning and Development Manager, Mid-Western Health Board

Elva Gannon, Head of Advisory Service, Health Services Employers Agency

Declan Hynes, Training and Development Manager, Eastern Health Shared Services

Mary Kelly, Director of Human Resources, Northern Area Health Board

Colm Kinch, Corporate Learning and Development Manager, North Eastern Health Board

Tony Liston, Corporate Learning and Development Manager, North Western Health Board

David Maguire, Department of Health and Children

Brian McElroy, Learning and Development Manager, St James's Hospital

Tony McMahon, Director of Human Resources, South Western Area Health Board

Anne McNeely, Personnel Officer, Beaumont Hospital

Willie Murphy, Director of Human Resources, North Western Health Board

Catherine Neary, Corporate Learning and Development Manager, South Eastern Health Board

Eamonn O'Brien, Director of Human Resources, North Eastern Health Board

Sorcha O'Quigley, Personnel Officer, St Vincent's Hospital

John Pepper, Human Resources Manager, Order of St John of God

Jackie Reed, Corporate Learning and Development Office, Western Health Board

John Ryan, General Manager, Coombe Women's Hospital

Mairéad Shields, Director of Human Resources, AMNCH

Vivienne Tegg, Director of Human Resources, South Eastern Health Board

Larry Walsh, Director of Health Service, National Partnership Forum

Members of Steering Group on Study of Management Skills and Attributes

William Beausang, Department of Health and Children

Jane Boushell, SIPTU

Kevin Callinan, Impact

Jacqueline Crinion, OHM

Joan Hodgins, Pearn Kandola (until June 2003)

Laraine Joyce, OHM

Mary Kelly, Director of Human Resources, Northern Area Health Board

John Loughran, Pearn Kandola (until June 2003)

Caroline O'Regan, OHM

Mairead Shields, Director of Human Resources, Tallaght Hospital

Alan Smith, OHM

Office for Health Management Publications

Office publications are circulated widely to staff throughout the health services. The following are brief summaries of the contents of each publication. Copies of publications can be downloaded from our website at www.officeforhealthmanagement.ie.

Job Analysis

Highlights the benefits of Job Analysis, a structured technique in designing job descriptions, person specifications and other criteria as a basis for most human resource systems.

Preparing a CV

Guidelines on preparing a CV. Offers valuable information on how to market yourself where you are both the product and the salesman. A CV is often the first and only

information a prospective employer will receive about you so its importance should never be underestimated.

Preparing for Interview

Areas covered include the selection process, interview agendas and types of interview, interview preparation, types of questions, the interview itself, and dealing with the aftermath.

Coaching and Mentoring

These guidelines are intended to provide an overview of what is involved in mentoring and coaching, what benefits accrue and who should mentor and coach.

Spotlight on Mentoring

Assesses the attitudes and perceptions of mentees, mentors, line managers and pilot mentoring co-ordinators with regard to mentoring as a development intervention for staff. Also identifies best practice approaches. The objectives were to evaluate how successful mentoring has been, to measure satisfaction levels and to identify key lessons learnt.

Executive Coaching – A Briefing Note for Potential Users

Provides answers to the most frequently-asked questions about executive coaching, which is a one-to-one process of support, challenge and personal development for senior managers. Executive coaches are usually external to the client organisation.

Action Learning – The OHM Guide for Users and Potential Users

Particularly good for managers who need to focus on their own jobs and on their own work, rather than on 'ideal world' issues. Covers management and change development; standard elements, uses and benefits of action learning; and some pitfalls associated with it.

Best Practice Guidelines for Developing a Human Resources Strategy

'How to' manual intended as a best practice template for directors of human resources and their teams across the various health boards and hospitals. It explains the rationale for a human resources strategy and how to develop the most suitable strategy for a health board or hospital, with tips for effective implementation, monitoring and review.

Managing Talent and Difference in the Health Service: The Case for Diversity

Puts forward a case for a more people-centred service, one that recognises the diversity of those we work with and those for whom we care. The case for diversity has never been stronger than it is now: legislative, demographic and economic changes all reflect this. Making a success of diversity will help us achieve higher standards of patient care.

Nursing Management Competencies

Commissioned by the Office in 1999 following the report of the Commission on Nursing, which recommended 'competency based approaches to management'. Eight 'generic' competency areas are identified.

Senior Nursing Managers Competency Development Pack

Helps top/senior-level nurse managers to identify and plan their personal, professional and management development. Only available online.

Guidance on the Commissioning of Nursing Management Development Programmes – Front-Line and Middle-Level Nurse Managers

Explores ways in which nurses and midwives can be further empowered through

management and personal development. Aims to ensure consistency and uniformity in the commissioning of nursing management development programmes.

Evaluation of Nursing Management Development Programmes – Front-Line and Middle-Level Nurse Managers

Examines attitudes and perceptions in relation to the management development programmes, with a view to discovering whether these programmes for middle nurse managers and front-line nurse managers were effective.

A Report on the Acorn Programme

The OHM commissioned the Acorn Programme from the Office for Public Management (UK) as part of its mission to foster equal opportunities within the health services. The results were both interesting and surprising. A comprehensive commentary on the Acorn Programme, representing the views of all involved.

Clinicians in Management: Introduction and Case Studies – Discussion Paper 1

An introduction to the clinicians in management initiative for professionals across the health services, providing a broad background to what is involved. Presents a variety of case studies from organisations which have already made significant progress in this area. The CIM initiative heralds the biggest change to the management of Irish hospitals for many years.

Clinicians in Management: A Framework for Discussion – Discussion Paper 2

Examines a range of areas: business planning; procedures; organisational structure; human resource management; management development and training;

change management issues; systems support; funding; resource requirements and evaluation. Examines practice in Canada and New Zealand.

Clinicians in Management: A Review of the Initiative and Pointers to the Way Forward – Discussion Paper 3

Comprehensive coverage of the background and context of the CIM programme. Includes topics such as the review process, managing change, and the enablers of further progress. Recommends some change management techniques and the development of new and improved competencies.

Clinicians in Management: A Review of Clinical Leadership – Discussion Paper 4

This discussion paper seeks to inform and stimulate discussion on clinical leadership. It explores the views of hospital doctors, their attitudes to participation in the leadership and management of their organisations and how leadership and management processes can be facilitated. The exploration includes whether doctors think CIM is a good idea in the first place, what would encourage or dissuade them from getting involved, and what can organisations do to facilitate them in taking on leadership roles.

Clinicians in Management at Work in Mayo General Hospital: Choices in CIM – Discussion Paper 5

Mayo General Hospital was chosen as a pilot site for the CIM initiative and the hospital authorities began the piloting process with the establishment of two project groups: a clinical policy and strategy group to define the concepts and structures of CIM and present a final CIM design for implementation; and a consultation and advisory group to manage the complex consultation process involving Mayo

General's staff and their trade unions. The progress of CIM at the hospital is charted.

Learning and Development Needs: Identification and Planning Toolkit

Provides users with the opportunity to play a part in ensuring that learning and development in organisations is targeted and cost-effective. Defines and analyses corporate learning and development needs, service learning and development needs, and unit/departmental learning and development needs.

Patient Satisfaction Surveys: Issues to Consider

A part of the implantation process of a national standardised approach to measurement of patient satisfaction. Patient satisfaction does not solely derive from the measure of clinical care delivered. Rather, it reflects of patients' approval of their global experience within the health service, from their time of entry into the system until their final exit. Thus, clinical care will form only one component of their overall experience; satisfaction will also be influenced by issues such as waiting times, access to services, emotional support, etc.

Public and Patient Participation in Healthcare: A Discussion Paper for the Irish Health Services

Describes international thinking on public and patient participation activities in order to assist health managers to place in context the proposals set out in the national health strategy and to provide them with examples of good practice models for doing so.

Women's Regional Networks Research Project

Presents comprehensive and valuable research on networking, a crucial ingredient

of success in any professional career because of the many advantages to be gained by its practice, including information exchange, collaboration, career planning, professional support and encouragement and upward mobility.

Women's Regional Networks – Network Audit Instrument

This network audit is an instrument designed to provide insights into how the network is performing and how successful it is. The audit examines the network against the five-factor model in order to identify which aspects are working well and which need more attention.

Modernising Staff Rostering: An Imperative for Progress – A Facilitator's Guide to Running a Workshop

The facilitator's guide to running the specially designed workshop entitled 'Modernising Staff Rostering: An Imperative for Progress' is based upon the practical experience of running two such workshops. The workshops were conducted by the Centre for the Development of Healthcare Policy and Practice at the University of Leeds, together with contributions from the North Western Health Board. The workshops were initiated and funded by the Office for Health Management.

Dialogue on Implementing Reform – Communication and Consultation Programme: July-Sep 2003 (available online)

The Office was requested by the DoHC to carry out a communication and consultation exercise with staff throughout the health service regarding the Health Service Reform Programme. This report summarises the views and concerns of staff in relation to implementation of the Reform Programme.

Report on an Evaluation Study of the Leading an Empowered Organisation Programme (LEO) for Clinical Nurse Managers 1

This study was conducted by the Centre for the Development of Nursing Policy and Practice, University of Leeds, for the Management Development Sub-group, Empowerment of Nurses and Midwives Steering Group – An Agenda for Change.

Report on the Diagnostic Exercise for Directors of Nursing/Equivalent Nursing Management Grades

This report summarises the Diagnostic Exercise for nursing/equivalent nursing management grades commissioned by the Management Development Sub-group of the Empowerment of Nurses and Midwives Steering Group – An Agenda for Change and conducted by the King's Fund. The report is set within the strategic context of the modernisation and reform of the Irish health service and the political and professional aspirations for the empowerment of nurses and midwives. It examines what can be done to strengthen that contribution through the education and development of top-level nurse managers.

Learning from the NHS in Change: A study on the management of major structural change in the NHS

This report, compiled by OPM (UK), explores how learning from the UK experience can assist strategic planning and organisational development in the Irish health services as they move into a period of unprecedented structural change. In detailing the nature of organisational change in the NHS over the last fifteen years, OPM have included an analysis of the change management approaches used.

***Personal Development Planning:
Guidelines and Workbook***

The PDP workbook provides a clear framework that allows people to identify in terms of personal development where they have come from, how they are getting on in their job at present, where they would like to be in the future and how they propose to get there. The information contained in this pack is available in more depth in the e-Learning section of the Office website. You can register online, access the PDP elearning programme, and work through an interactive PDP workbook online.

***Good Practice in Leading and Managing
Change in Health Service Organisations:
11 Case Studies***

The experience of introducing change in the Irish health service has been, by and large, both very good and very successful. This report provides qualitative evidence of examples of this experience in leading and managing change. The purpose of this documenting of good practice is to provide guidance and insights to other potential leaders and managers of change in the health service.

***Management Competency User Pack for
Managers of Health and Social Care
Professions***

The competency user pack is the result of research commissioned by the Office in response to a need identified in a report from the Expert Group on Various Health Professions. This pack is available on the Office Knowledge Centre.

***Management Competency User Pack for
Clerical/Administrative Grades IV to
Senior Management***

The Office competency user pack for clerical administrative grades ensures that their

management development needs are also considered and are available on the Office Knowledge Centre. Competencies have been identified for managers of the clerical/administrative grades IV to senior management teams inclusive.

***Management Competency Frameworks
for Health and Social Care Professions
and Clerical/Administrative Grades IV to
Senior Management inclusive: Technical
Report*** (available online)

The competency frameworks are the result of research commissioned by OHM in 2001 in response to a need identified in a report from the Expert Group on Various Health Professions. The Office decided to extend this research to include the clerical administrative grades to ensure that their management development needs could also be considered.

Office for Health Management Financial Data 2003-2002

	Year Ended 31/12/03 €	Year Ended 31/12/02 €
Income		
Department of Health & Children Allocation	4,061,000	1,975,000
Allocation Deferred	-1,400,000	-245,000
Other Income	447,695	829,718
	<u>3,108,695</u>	<u>2,559,718</u>
Expenditure		
Pay Expenditure	592,675	560,996
Non Pay Expenditure	2,507,612	1,996,675
	<u>3,100,287</u>	<u>2,557,671</u>
Surplus for the year	<u>8,408</u>	<u>2,047</u>
Balance Sheet		
Tangible Fixed Assets	<u>103,322</u>	<u>129,726</u>
Current Assets		
Debtors	41,079	367,882
Bank	2,325,305	239,345
	<u>2,366,384</u>	<u>607,227</u>
Creditors	<u>-2,252,399</u>	<u>-528,254</u>
Net Current Assets	<u>113,985</u>	<u>78,973</u>
Total Net Assets	<u>217,307</u>	<u>208,699</u>
Represented by		
Income & Expenditure Account	<u>217,307</u>	<u>208,699</u>

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