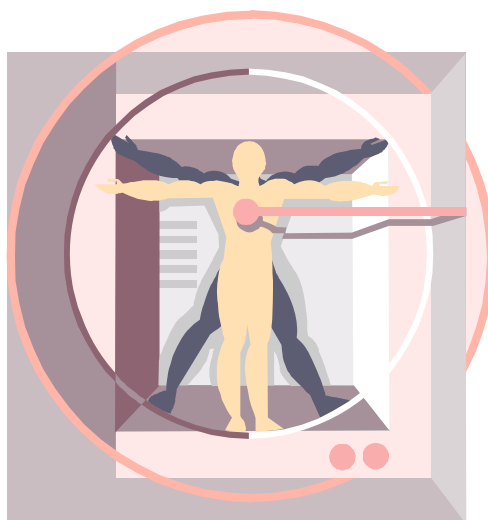


Whole Systems Working for Learning and Development

A Whole Systems Working Strategy



This document describes a 'Whole Systems' philosophy for learning and development in health and social care in Peterborough

A WHOLE SYSTEMS WORKING STRATEGY
FOR LEARNING & DEVELOPMENT
FOR HEALTH AND SOCIAL CARE WORKERS IN PETERBOROUGH

INTRODUCTION

Purpose

1. The purpose of this Whole Systems Working Learning and Development strategy is to establish a base upon which to build a system of learning and development for all staff and volunteers who provide health and social care services in Peterborough. This will enable them to obtain the skills, knowledge and competences they need to underpin the delivery of high quality services.

Context

2. This strategy document acknowledges the considerable amount of work going on within the health and social care arenas that has an impact on learning and development. It does not, however, duplicate work going on there.

3. The strategy also recognises the excellent learning and development practices that already exist.

Need for a Strategy

4. The need for this strategy is driven by a desire at the highest levels to do things differently.

"As Chief Executive of the Greater Peterborough Primary Care Partnership, I see whole systems working as essential if we are to provide the high quality of health and social care services that the people of Peterborough deserve and demand."

Mr Chris Town - December 2004

A way must be found of providing high quality health and care services that are cost-effective so that funds are not diverted unnecessarily from the 'front line'. As far as learning and development are concerned, health and social care staff and volunteers need to have access to learning that provides them with the skills, knowledge and competences necessary to deliver these services in a highly effective manner.

5. Although there is already some excellent work taking place in providing learning and development in Peterborough, there are opportunities for more shared and integrated provision across health sector and geographical boundaries.

6. Presently, funding streams, financial arrangements and procurement and use of other resources needed for learning and development in all stakeholder organisations are varied, complex and, in many cases, mysterious. No-one has overall visibility of funding even though the amounts of money involved are considerable: running, collectively, into millions of pounds. There needs to be greater overall visibility and understanding of funding streams, budgets, resource utilisation and costs, primarily to enable the targeting of resources to where they are needed most.

7. A Whole Systems Working approach will aim to deliver learning and development across Peterborough that is:

- Focused on need - enabling the right people to gain the right knowledge and skills at the right time.
- Shared across geographic and service boundaries.
- Available to all health and social care workers, including volunteers.
- Flexible to ensure that the appropriate methods of enabling learning are used to suit individual and organisational needs.
- Agile in responding to the needs of staff and volunteers as well as users of services.
- Sustainable - looking long term as well as meeting immediate needs.
- Conducted jointly between organisations, wherever it makes sense to do so.
- Cost-effective - demonstrating value for money.

AIM

8. The aim of this strategy is to provide a solid foundation upon which to build a system of learning and development that will enable all health and social care workers in Peterborough to gain the skills, knowledge and competences they need to deliver high quality services.

WHOLE SYSTEMS WORKING

Definition

9. The definition that will be used for Whole Systems Working is the one that has been adopted the NHS:

Whole Systems Working means having a shared set of common values, backed by a culture in which the joint commitment to doing the right things for patients and clients transcends the aspirations of individual organisations.¹

¹ Working in partnership: developing a whole systems approach - Good practice guide - published by the NHS Executive in March 2000

Components of Whole Systems Working

10. A working definition of Whole Systems Working comprises²:

- Overarching Policy and Goals - describe a headline policy and strategic goals. Until these are agreed by core component organisations (of the 'whole system') subsequent work would be based on unsound foundations.
- Accountability - describes a management framework within which specific accountable people are identified.
- Networking and Alliances (and Communication) - address the means by which change is achieved and the degree of commitment of stakeholders.
- Culture and Learning - address the way that stakeholders embrace joint working and the way that they learn from local and national good practice.
- Resources - describes the need for ensuring the appropriate use of resources, including the commitment of staff and their time to take work forward.
- Skills and Competences (or Organisational Capacity) - address the local capacity and capability to deliver the final outcome.

Stakeholders

11. The following organisations and sectors are considered to be stakeholders in Whole Systems Working in health and social care in Peterborough:

- Greater Peterborough Primary Care Partnership (GPPCP)
- Peterborough and Stamford Hospitals NHS Foundation Trust (PSHNHSFT)
- Peterborough City Council
- Cambridgeshire and Peterborough Mental Health Partnership NHS Trust (CPMHPNHST)
- East Anglian Ambulance NHS Trust (EAANHST)
- The Voluntary Sector - represented by Peterborough CVS
- The Independent Sector including:
 - General Practices
 - Dentists
 - Pharmacists
 - Optometrists
 - Care Homes
 - Domiciliary Care

² Working in partnership: developing a whole systems approach - Good practice guide - published by the NHS Executive in March 2000

12. In addition, the following organisations have an impact on and will be affected by this Whole Systems Working framework:

- Norfolk, Suffolk and Cambridgeshire Strategic Health Authority
- The Deaneries (GPs and Dentists)
- Homerton College
- Post-Graduate Centre
- Anglia Support Partnership
- Children's Services
- Learning and Skills Council
- Higher Education and Further Education providers (including, but not restricted to, the University of East Anglia, Anglia Polytechnic University and Peterborough Regional College)

WHOLE SYSTEMS WORKING LEARNING AND DEVELOPMENT STRATEGY

Overarching Policy and Goals

Overarching Policy

13. The fundamental purpose of learning and development in the Peterborough health and social care community is:

To help to enable staff and volunteers to provide high quality health and care services for the benefit of those people who need and use these services.

This means enabling the right people to gain the right skills and knowledge at the right time.

14. Learning and development do not stand alone. They are integrated with the business of providing health and care services and they contribute to shaping and supporting the cultures of the organisations that deliver these services.

15. Learning and development are primarily the responsibility of individuals, but the organisations and managers for whom they work have a major and crucial part to play. The linkage is provided through development review and performance management, including specifically appraisal, which need not be identical across organisational boundaries, but they must exist and they must be used effectively.

16. Learning and development are not synonymous with training. Training is one of a number of methods of enabling learning. Other methods may be more relevant and appropriate for health and social care workers.

Goals

17. Stakeholder organisations and sector representatives are signed up to the following:

- The overarching policy described above, which forms the basis of individual organisations' Learning and Development policies.
- A common Learning and Development Management model, which enables the identification of learning needs, the provision for learning that suits individuals' and organisations' requirements and evaluation of the effectiveness of learning that takes place. A diagrammatic representation of this model can be found at Annex A. A subsequent Implementation Plan³ will describe how it is used.
- A philosophy that learning and development are unequivocally individual and line manager responsibilities - any learning and development departments or specialists provide expertise in support of individuals and line managers; they do not assume their managerial responsibilities.
- A willingness to share information, funding, resources and expertise.

Accountability

18. At a practical level it is the people who fulfil the roles of *learning and development leads* in stakeholder organisations who are most involved with the day to day delivery of Whole Systems Working for Learning and Development in Peterborough. These are the most senior people with professional responsibility for learning and development within stakeholder organisations. The names of *learning and development leads* can be found at Annex B and it is important for these people to manage the learning and development in the organisations they represent, whilst looking beyond their organisational boundaries.

19. There are occasions when directors, chief executives and boards of stakeholder organisations are needed to take decisions, particularly in areas of funding for example, or provide strategic guidance by articulating clearly their visions, missions and core values.

Networking, Alliances and Communication

20. Communication is the single most crucial aspect of Whole Systems Working as it is applied to learning and development in Peterborough. Without robust structures and mechanisms and a strong desire to make certain that high quality communication takes place, everything else will probably fail.

21. High quality communication is a multi-dimensional process, involving dialogue throughout organisational structures and beyond organisational boundaries. It is the 'corporate glue' that holds everything else together.

³ This Implementation Plan will be complete by the end of June 2005.

22. Enabling effective communication connected with learning and development for the 10,000⁴, or so, health and social care workers in Peterborough is formidable and cannot rely entirely upon informal networks or loose alliances.

23. There will be formal structures involving the meeting of people and groups at different levels and at different times. There will also be an ICT infrastructure that will assist in the capture, storage and dissemination of information and there will be regular newsletters. In addition, there will be a one-stop-shop for anyone who wishes to access advice about learning and development and there will be a simple, but formal, process for identifying and reacting to new learning requirements and altering existing solutions where necessary.

24. Wherever possible existing organisational structures and bodies (such as committees and working groups) will be utilised. This will maximise the opportunity to ensure that learning and development are integrated with the business of providing health and care services and it will minimise additional bureaucracy.

Culture and Learning

25. A major strength of a robust Whole Systems Working framework is that it promotes joint working and learning from good practice. These will not happen, however, merely because a framework has a particular label.

26. It is a principle of Whole Systems Working in Peterborough that provision for learning and development must be joint and shared, unless there are strong reasons for them to remain separate. Whilst there is no desire to seek 'one size fits all' learning and development solutions or to take away organisations' preferred solutions, there is a requirement to look for ways of providing joint and shared solutions wherever it makes sense to do so.

27. In addition, learning in, or close to, the workplace has a number of advantages over sending people on courses. Work-based learning can be provided in a more flexible manner and it can be more readily applied. It also has considerable advantages in helping to forge strong working relationships. It is, therefore, another principle of Whole Systems Working in Peterborough that work-based solutions to learning and development will be considered as first options during the design of new programmes and the redesign of existing programmes.

28. As part of a formal process for designing new learning and development solutions there is a requirement to consider good practice elsewhere, either within Peterborough or outside, with the aim of deriving benefits from other people's experiences.

⁴ Estimated from: 4500 people (excluding volunteers) who are employed by the PSHNHSFT, 1500 people who are employed by the GPPCP, 1000 people who work in Peterborough and are employed by the CPMHPNHST, the 400 people who work in Peterborough and are employed by the EAANHST, the 1200 people who work in the independent sector and 1200 volunteer carers in Peterborough.

Resources

29. Provision for learning and development must be cost-effective, thereby leaving as much funding as possible for the 'front line'.

30. With around 10,000 health and social care workers in Peterborough it would be unrealistic to expect to enable high quality and cost-effective learning and development without some kind of overarching infrastructure.

31. Building on human resources already in place, appropriately qualified people will be required to take forward the necessary work. This will be based on an implementation plan that will result from this strategy. The costs will be shared between stakeholder organisations and the emergent organisational infrastructure will be, mostly but not entirely, virtual rather than real. This will allow formal reporting lines, generally, to remain within stakeholder organisations.

32. In order to minimise overhead costs, methods of delivery of training and other learning activities will be decided after comparing the merits of internal and external delivery. Where external delivery is deemed to be the most appropriate, effective commissioning arrangements will be used to ensure that learning outcomes of appropriate quality are achieved.

33. Whilst it is important for learning and development to be supported with a high quality Information and Communication Technology (ICT) infrastructure, it is not possible to prescribe what shape this should take. As far as this strategy is concerned, it is an aspiration that the Norfolk, Suffolk and Cambridgeshire Strategic Health Authority should work towards a common, or at least connected, ICT infrastructure with which to manage learning and development, and one that is integrated with HR functions.

34. As far as funding is concerned, learning and development will be treated as any other functional activity and value for money will be taken into account when making decisions that have cost implications. It will be important to assess the value of learning outcomes in terms of performance improvement and this will necessitate identifying appropriate criteria.

Skills and Competences

35. The success of a Whole Systems Working framework for learning and development in Peterborough will depend greatly on the capabilities of the people who form the core staff and on the ethos of the whole health and social care community.

36. Core learning and development staff will be professionally and speciality qualified. They will form a team, virtual and otherwise, that provides capacity and expertise in the business of enabling learning and development in health and social care.

37. As far as ethos is concerned it will be important for there to be a consistent attitude to learning and development across and through stakeholder organisations. Although this has already been mentioned in paragraph 15, it is so important that it is worth re-stating here:

Learning and development are primarily the responsibility of individuals, but the organisations and managers for whom they work have a major and crucial part to play. The linkage is provided through development review and performance management, including specifically appraisal, which need not be identical across organisational boundaries, but they must exist and they must be used effectively.

38. The important implication is that a firm and consistent message will need to permeate all stakeholder organisations and in some this will cause a shift of emphasis:

- Firstly, all workers (staff and volunteers) will need to be encouraged and enabled to take responsibility for their own learning and development - a key tenet of the Knowledge and Skills Framework.
- Secondly, line managers will need to use review and performance management systems (perhaps informal systems with volunteers) to engage workers in seeking continuous escalation of skills, through individual and collective (team) learning.
- Thirdly, the management of budgets will need to be harmonised to ensure that resources are allocated to people and places where they will have greatest beneficial impact on service delivery.

RECOMMENDATIONS

39. The Steering Group is asked to endorse:

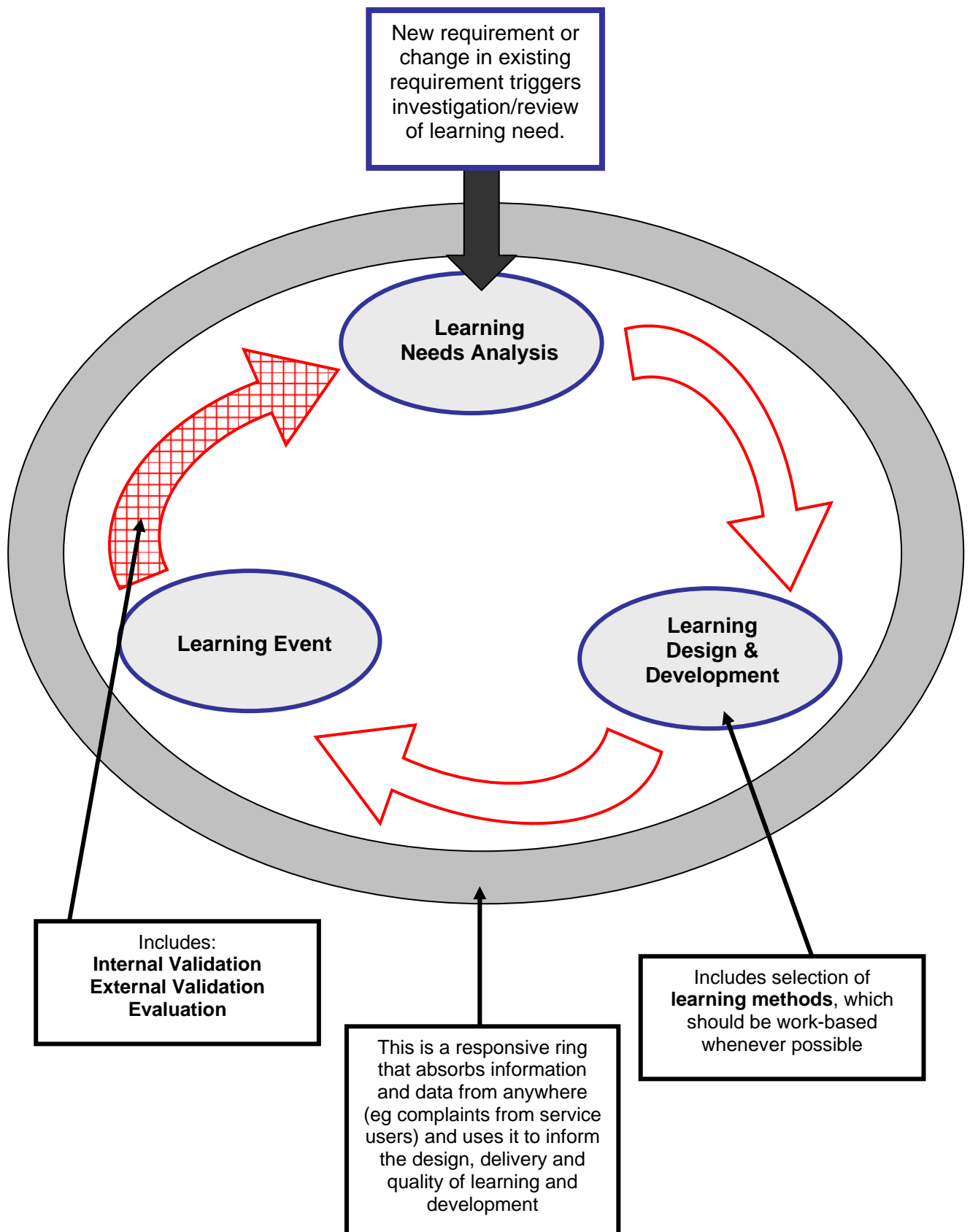
- The strategy described in this document*, and
- The main headings, at Annex C, for future work towards a subsequent Implementation Plan.

* The Steering Group has now endorsed this strategy

C Cordery

Chris Cordery
WSW-LD Project Director
21 March 2005

GREATER PETERBOROUGH HEALTH & SOCIAL CARE COMMUNITY
LEARNING AND DEVELOPMENT MANAGEMENT MODEL



GREATER PETERBOROUGH HEALTH & SOCIAL CARE COMMUNITY
LEARNING AND DEVELOPMENT LEADS IN STAKEHOLDER
ORGANISATIONS

- Greater Peterborough Primary Care Partnership (GPPCP)
 - Joe Meenaghan - Workforce Development Manager
 - Hilary Koe - Project Director Teaching PCT
- Peterborough District Hospitals
 - Derek Furze - Assistant Director - Learning and Development - PSHNHSFT
- Peterborough City Council
 - Angela Fisher - Business Development Manager - PPDC
- Cambridgeshire and Peterborough Mental Health Partnership NHS Trust
 - Kath Gordon - Senior Training Manager
- East Anglian Ambulance NHS Trust
 - Jonathan Taylor - Head of Learning & Development Team Leader
- The Voluntary Sector - represented by Peterborough CVS
 - John Cunningham - General Secretary
- The Independent Sector including:
 - General Practices - *via the Clinical Governance Operational Leads Group*
 - Dentists - *via the Clinical Governance Operational Leads Group*
 - Pharmacists - Sharron Patrick - Medicines Management and Prescribing Manager - GPPCP
 - Optometrists - *via the Clinical Governance Operational Leads Group*
 - Care Homes - *via the Care Sector Strategy Group*
 - Domiciliary Care - *via the Care Sector Strategy Group*

Items shown in *italics* are not individuals but groups representing sectors

FUTURE WORK TOWARDS AN IMPLEMENTATION PLAN

1. Develop a full Learning and Development Management model based on the diagram at Annex A.
2. Develop a process for embedding a culture in which all health and care workers (including volunteers) take prime responsibility for their own learning and development.
3. Develop a process that enables line managers to take a consistent approach, based on the Knowledge and Skills Framework (which applies to most, but not all, health workers), to the learning and development of their workers, including volunteers.
4. Design a network that will enable effective communication.
5. Determine how to gain greater 'whole system' understanding of funding for learning and development.
6. Map existing learning and development provision to establish what is in place across the 'whole system' of stakeholder organisations.
7. Assessment:
 - a. Determine an overall approach for assessing how learning and development contribute to the delivery of high quality health and social care services.
 - b. Determine criteria that will assist in assessing how learning and development help to deliver high quality health and social care services.
8. Gain agreement of the responsibilities of Learning and Development leads in connection with Whole Systems Working.
9. Design an infrastructure (people and ICT) that is capable of delivering Whole Systems Working for learning and development.
10. Seek opportunities for immediate implementation of actions.