

UNION MODERNISATION FUND

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**ALLIED HEALTH PROFESSIONS –
INVESTIGATING OPTIONS FOR
COLLABORATION**

Allied Health Professions – investigating options for collaboration

Introduction

The impetus for this project was derived from the Allied Health Professions' (AHP) modernisation strategy. The over-arching aim of the strategy, which member organisations have all signed up to, is to work collaboratively to enhance the breadth and quality of the services provided for each organisation's membership groups.

The participating organisations have a long history of working together, particularly in the area of influencing the working environment for members. Although this work had tended to be one-off initiatives, such as the Chartered Society of Physiotherapy providing union services to the British and Irish Orthoptic Society, they did demonstrate that working together provided real benefits to those involved in terms, for example, of economies of scale. AHP Project Manager, Sue Browning, explains:

'AHP member organisations shared the sense that doing nothing risks losing opportunities for establishing a strong platform for change and more efficient, effective and joined-up ways of working, with better use of money and resources. The bottom line is that savings from more effective and efficient business processes and ways of working could be committed to improving the set of services to members of the individual unions within the AHP member organisations.'

Background

Allied Health Profession (AHP) member organisations are:

- The College of Occupational Therapists (COT)
- The British Dietetic Association (BDA)
- The British and Irish Orthoptic Society (BIOS)
- The Chartered Society of Physiotherapy (CSP)
- The Royal College of Speech and Language Therapists (RCSLT)
- The Society of Chiropodists and Podiatrists (SCP)
- The Society and College of Radiographers (SoR)

Yet there had never been a formal review of appropriate collaborative working models, or a systematic identification of the potential for collaboration. And without the Union Modernisation Fund, research into these areas would not have been possible.

Why this project?

A concerted, wide-ranging and strategic approach to identifying collaborative working initiatives had been prevented up to this point by the dramatic downturn in revenue that organisations had witnessed during the 18 months before their application to the UMF – the reduction in the number of jobs in the health sector had meant a severe drop in advertising revenue for these organisations. This UMF project, therefore, was seen as particularly important to the transformation of the unions. Since some of the unions have fewer than 1,000 members, budgetary constraints had ruled out the investigation of likely approaches. With UMF funding, however, the AHP member organisations were able to commission BlueSpark Consulting to undertake a feasibility study into collaborative working. Participating organisations were keen to undertake this work, believing that it would provide the opportunity to operate more efficiently and effectively in delivering member services.

The overarching theme of the project was to work collaboratively to enhance the breadth and quality of the services provided for each organisation's membership groups.

The objectives were:

- To undertake a feasibility study to determine the most efficient and cost-effective models for collaborative working, including:
 - Advantages and disadvantages of possible collaborative working models
 - The preferred model(s) and associated business case(s), compared with other potential models and with their relative priorities
 - 'Quick wins' – collaborative working opportunities that could be progressed before the formal acceptance of the feasibility study report

- From the study, an achievable set of plans would be developed for implementing the more significant collaborative working initiatives, phased according to priority and taking account of available resources, both internal and external.

Methodology and outcomes

BlueSpark began by reviewing information provided by each participating organisation, coupled with a series of one-to-one meetings with each. The results they gathered were published as the Initial Findings and Potential Options for Collaboration report in March 2008.

Development of collaborative working options

Once the initial findings were published, a workshop to discuss them was run for Project Board members and the chairs and a past president of each participating organisation. It was agreed at the workshop which options should be researched further as the next stage of the feasibility study. The short-listed options included:

- Sharing a building
- Sharing in-house back office functions for:
 - HR
 - Membership administration
 - A member call centre
 - Events management
 - IT support, systems and technology
 - Business continuity planning
- Providing training courses and CPD to members
- Sharing trade union activities
- Shared procurement
- Succession planning.

All felt that significant cost savings could be realised through shared procurement and outsourcing and that a feasibility study was not needed to demonstrate this. Shared procurement would therefore not be the focus of further research but would be considered and progressed by the finance directors of the participating organisations. Training courses and CPD were considered as possible areas where improved collaboration between participating organisations could be implemented relatively quickly, so would also be considered further by participating organisations outside the scope of the project.

BlueSpark then undertook more detailed research to develop the short-listed options further and produced a Potential Options for Collaboration report in April 2008, which included a detailed assessment for each of the final shortlist, including risks, benefits, costs, timescales, resource/skill requirements and locations. This was discussed and agreed at a Project Board meeting in May 2008.

First Council consultation period

A subsequent report, Potential Options for Collaboration, was issued to Councils in May 2008, followed by a Council consultation period until early July, when participating organisations and their Councils considered which options should be taken on to the next stage of the feasibility study.

Based on the feedback from Councils, it was agreed at a Project Board meeting in August 2008 that two options should be taken forward:

- Sharing a building in central London
- Sharing in-house back office functions – HR, membership administration, a member call centre, events management, IT support, membership database system, HR software, finance software, servers and network infrastructure, website technology and/or hosting, intranet facilities, off-site backups and business continuity planning.

BlueSpark undertook more detailed research and analysis to develop these options further, producing three reports in early December 2008 – a Summary Report, a Business Cases Report and a Payback Paper. Having reviewed these reports, Project Board members considered and scored the suggested options for collaboration in terms of the potential qualitative benefits (improvements in quality and effectiveness of delivery of services) that each option would deliver.

The Project Board's shared vision

The Project Board agreed that, based upon its scoring, its vision for collaborative working was to share a building and the following back office services:

- An HR team or some HR functions
- Events management
- ICT support
- Servers and network
- Offsite backup
- Business continuity plans.

The Project Board also agreed that if participating organisations were not to share a building, its vision would be to share:

- An HR team or some HR functions
- ICT support
- Servers and network
- Offsite backup
- Business continuity plans.

The remaining options (shared membership administration, member call centre, membership database system, HR software, finance software, website technology and/or hosting and intranet facilities) were not completely ruled out – improved collaboration in these areas could follow at a later stage.

A Report for Consultation with Councils, which combined the three previous reports and incorporated the feedback from the December Project Board meeting, was produced in January 2009.

Second Council consultation period

The second period of Councils' consultation ran from late January to late March 2009. Project Board members presented the Report for Consultation with Councils to their Council and gathered feedback on whether it wanted to be included in the implementation planning stages. In order for implementation planning to be as accurate and helpful as possible, participating organisations were asked to put themselves forward only for those options they were firmly committed to and believed to be feasible.

The Project Board met in April 2009 to make its final decisions about which collaboration options would be given the go ahead.

Feasibility study results and outcomes

At its meeting in April 2009, the Project Board discussed how the significant change in the UK's economic climate had impacted upon the potential for collaborative working since the inception of the feasibility study. Throughout the study, the majority of participating organisations had been enthusiastic about the potential for sharing a building. However, their Councils now considered that the move would be inappropriate in the present economic climate, believing that there was a need to prioritise economic stability and support members through the uncertain times.

Project Board members confirmed, therefore, that sharing a building was not a viable option at this time and should not be taken forward to implementation planning. However, the Project Board did agree to meet again in a year's time to review the

situation and that in the meantime any participating organisations that wished to could do their own research into the market.

The Project Board also agreed that the potential for more structured collaboration, amongst all or some of the participating organisations, should be investigated further in the following four areas:

- Events management, CPD and training
- HR
- Offsite backups and business continuity planning
- Shared procurement.

They dismissed the further investigation of shared IT support, as the participating organisations were either happy with the support they had, or had already approached one of the collaborating organisations to buy in support.

The four groups met in summer 2009 to review the options for more formal collaboration and are developing the options and draft proposals for the Project Board to consider in December 2009.

Benefits

At its meeting in April 2009 the Project Board agreed that there were additional benefits and outcomes from the feasibility study, including:

- A demonstrated commitment from the chief officers of the organisations to collaborative working
- Opportunity for each organisation to examine and challenge its current accommodation and practices
- Deeper understanding of each other's organisation, facilitating great interaction and the sharing of experiences and learning
- Deeper cultural expectation that the organisations work more closely together

- Increased level of transparency and trust between the organisations, eg having shared confidential data and previously unspoken perspectives
- Executive Councils benefited from having to look at their accepted structures in a critical way and in comparison to others
- Appreciation at Board level of the different structural and governance models among the partners
- Engagement of the governance of each organisation in these discussions and beyond to consider further partnership working.

What's more, the organisations now interact routinely on different subjects and at different levels. For example, there is a cross organisation educators group and the finance leads meet on a regular basis.

Sue Browning is delighted with the outcome of the project:

'The objectives of this project have been achieved in full, with the project running smoothly to time and budget throughout. Of particular success has been the consistent full engagement of the chief officers, demonstrating their commitment to collaborative working. Bringing seven very different member organisations together to build formal strategic collaboration is a challenge in terms of differing cultures, decision making structures and timetables, but the methodology used proved very effective, giving each body the necessary space for full consideration during the two decision making periods.'

Richard Evans, Chief Executive Officer, The Society and College of Radiographers, agrees:

'This project has provided the structure and discipline that we required to examine the opportunities for collaborative working. We now have a reference for future projects and an incentive to consider our partner bodies as we seek to develop efficiency within each organisation.'

Joanna Brown, Chief Executive, The Society of Chiropractors and Podiatrists, adds:

'Although we have a good history of cooperation, the project has given this more impetus. It has brought together officers who may not have worked together before and the collaborative work is viewed as more of a priority. This area is now a "must do" rather than a "nice to do".'

Looking ahead

The finance directors from participating organisations will take forward the shared procurement option. Groups comprising a senior member of staff from each organisation have been formed to take forward the other three options.

All participating organisations agree that it has been successful in significantly strengthening the foundations for further future effective collaboration and more efficient and cost-effective partnership working, enabling participating organisations to develop a shared understanding.

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