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**Working Together for Change
and a Modern Workplace**

Partnership Guidance for
the Unionised Commercial Sector

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Foreword

Working Together – For Change and a Modern Workplace shows that companies can significantly improve their performance and achieve major organisational change through partnership. This report focuses on the changes occurring within organisations and the challenge this presents for employers, employees and unions.

Modernising and improving workplaces is a significant and fundamental challenge. Organisations and individuals now face increasing volatility and complexity — in their working lives and in their private lives. For organisations, there is relentless pressure to find new and improved ways to compete in the context of transparent and volatile international markets. This means increased pressure on organisations and their employees, and these demands exist alongside important day-to-day concerns around issues such as re-training, learning, job security, childcare, transport and health.

In this way, the modern economy, more than ever, exposes organisations and individuals to the full rigour and force of change. The need to respond to the challenge of change is recognised and embraced equally by both employers and employees. Enterprise level partnership can offer a means of developing a viable, enduring and productive response in keeping with organisational needs and culture.

This report reflects the experiences of specific organisations and their ongoing work to develop an effective modern workplace — in each case a workplace that is both competitive and efficient but also responsive to the needs of its employees. The report illustrates that confronting and tackling the complex problems of competing and living in the modern economy through partnership-type arrangements is a real alternative to other more traditional approaches to change.

The success of social partnership at a national level suggests that economic and social development can be greatly enhanced when problem-solving combines the efforts and insights of the various parties affected by and interested in change.

In improving and changing workplaces, partnership can, as the cases examined here illustrate, provide a meaningful and effective problem-solving methodology. In practice, there are many unresolved issues — the connection with traditional industrial relations, the approach to governance and reward systems — but the potential is clear.

The production of this report benefited enormously from the contributions and expertise of Tom Wall (ICTU), Liam Doherty (IBEC), Tom Neville (Consultant) and Larry O’Connell and staff at the National Centre for Partnership and Performance. Finally, I would like to sincerely thank all the individuals in each of the four companies that co-operated so generously in this research.

A handwritten signature in blue ink that reads "Lucy Fallon-Byrne". The signature is written in a cursive, flowing style.

Lucy Fallon-Byrne

Director

National Centre for Partnership and Performance

Introduction

The challenge of successfully implementing enterprise-based partnership initiatives is one that has been taken up by many organisations. It has been addressed primarily because organisations are interested in modernising their workplaces to become more efficient, flexible and adaptable, and thus even more responsive to change, while employees are interested in having input into the decisions that affect their working lives, and improving their own quality of life.

Under the Programme for Prosperity and Fairness, IBEC and ICTU committed themselves to jointly produce a set of guidelines in relation to enterprise-level partnership. What has become clear, as a result of experience with partnership in the commercial sector, is that it is impossible to construct definitive guidelines in relation to this area. The range of experience is so diverse that in order to assist companies considering undertaking partnership initiatives, IBEC and ICTU need to impart information about enterprise-level partnership in a variety of ways which could assist those who are dealing with the real issues on a day-to-day basis in the unionised commercial sector.

This document takes a pragmatic approach to the issue, and examines the following:

- The foundations of enterprise partnership
- Four case studies of diverse Irish organisations which examine their partnership processes in depth, and the benefits they received
- Lessons from these case studies and other organisational experiences
- Guidance that may prove useful to those undertaking partnership initiatives.

It is hoped that the reader can develop an appreciation for the practicalities of what is involved in operating a successful enterprise-level partnership, and the case studies in particular have been chosen with this in mind.

This document has not been written in a vacuum. Organisations are facing real issues in relation to addressing change and progressing partnership-type initiatives. Some organisations have made substantial progress, and others have found this more difficult to achieve. This document recognises the challenges that face all organisations unions and employers in this regard, and will hopefully provide some practical assistance for those whose aim it is to modernise their workplaces through partnership approaches.

Partnership – The Irish Context

A significant level of innovation and experimentation with partnership-based approaches to decision-making has been evident in recent years in the Irish private and public sectors. Professor Bill Roche's recent assessment of Irish progress with partnership — carried out for the National Centre for Partnership and Performance¹ — suggests that social partners and many firms, workforces and unions have already acquired significant experience with the operation of various modes and forms of partnership.

Partnership has been adopted, in a number of cases, as an approach to handling major programmes of market-driven change or deregulation. Professor Roche argues that Ireland may possess a number of exemplars and models of partnership of international significance. However, there is a need to present compelling evidence that partnership can and is delivering significant organisational change and improvement. This report aims to enhance the diffusion of partnership by focusing on the practical details of partnership arrangements, their operation, and their benefits.

This report seeks to clarify the significance and potential of partnership within an Irish context. This chapter begins this process by clearly situating enterprise partnership as an approach to organisational change within the wider context of national partnership agreements. The chapter outlines the link between national partnership

and enterprise level agreements, including the definitions developed at a national level for the latter.

Chapter 3 turns attention back to the changes underway within individual enterprises as it presents national and international experience in relation to enterprise partnership.

2.1 Linkage between Partnership at National Level and Enterprise Level

Social partnership at a national level has been a feature of the Irish economy over the last fifteen years. It has been the vehicle to promote competitiveness, industrial peace and wage moderation, as well as ensuring that all stakeholders can play a part in framing the Ireland of tomorrow. Employers and Unions have played lead roles in this respect, and together with the other social partners have concluded a series of formal agree-

ments which put in place the principles and the objectives of National Social Partnership.

Partnership 2000, published in 1997, looked at extending this national partnership concept to the enterprise level. The Programme for Prosperity and Fairness (2000) re-emphasised its importance. It was a recognition of the fact that organisations were facing significant competitive challenges, and that employees could contribute to meeting these challenges and enhance their own security of employment at the same time. It was also a recognition of trends within organisations to involve people more in decisions that affected them and the enterprise.

It is worthwhile revisiting the basic framework for enterprise partnership contained in The Programme for Prosperity and Fairness, and we do this briefly below. It will be useful in understanding much of what follows.

¹ See National Centre for Partnership and Performance Strategic Planning Discussion Document, 2002

2.2 Partnership Definitions and Terms

The term enterprise partnership is defined formally at Section 1.3(a) of Framework 1 of PPF as:

“an active relationship based on recognition of a common interest to secure the competitiveness, viability and prosperity of the enterprise. It involves a continuing commitment by employees to improvements in quality and efficiency; and the acceptance by employers of employees as stakeholders with rights and interests to be considered in the context of major decisions affecting their employment.

Partnership involves common ownership of the resolution of challenges, involving the direct participation of employees/representatives and an investment in their training, development and working environment.”

Section 1.3(a) also outlines the objectives of enterprise-level partnerships.

- To enhance organisational capability to contribute to competitive advantage;
- To improve the environment for work in tandem with the achievement of production and service excellence and
- To build on existing workplace relationships through the establishment or deepening of the partnership process at enterprise level.

Section 1.3 (a) also outlines the topics for possible discussion at enterprise level, depending on the particular circumstances of the enterprise and recognising the voluntary nature of the process. They are as follows:

- Competitiveness, adaptability, flexibility and innovation in the enterprise
- Better systems of work organisation
- Training and personal development which is linked to lifelong learning
- Measures to promote equality of opportunity and family-friendly working arrangements
- Problem solving and conflict avoidance
- Occupational health and safety issues, including physical environment issues
- Information and consultation
- Time off, facilities and training for staff representatives; and
- Forms of financial involvement.

While partnership has evolved in many different ways, it has done so in the context of an understanding of the agreed national framework as outlined here. Many of the case study organisations whose experiences are outlined later have referred to this framework at some point.

Foundations for Enterprise Partnership

This report is designed to assist individuals who are working to make the case for modernising their workplaces through enterprise partnership. This chapter places the findings from the four Irish cases in this study in a wider national and international context. The chapter draws on national and international research, experience and evidence to identify the benefits of partnership-type arrangements and to show how it leads to better solutions for employers, unions and employees.

The first section of the chapter presents a brief overview of national and international research and summarises the key benefits linked with workplace partnership. It begins to make the case for or to provide reasons why partnership might be useful for companies, unions and employees.

Section two is based on national and international case studies. The chapter begins the process of explaining how partnership can make an effective contribution to organisations and individuals. It focuses on how participative partnership-type arrangements actually enable them to achieve superior mutual gains.

The chapter establishes the potential for partnership to contribute to significant and innovative organisational change by showing why and how partnership-type innovations matter to

competitive organisations, their employees and unions, both in Ireland and internationally.

3.1 Benefits Associated with Enterprise Partnership

Why should an organisation or an individual employer, manager, employee or union consider partnership as a way to cope with change? What are some of the tangible benefits of partnership?

International and national research suggests that there are several reasons why a less adversarial approach is a better way to meet the challenges faced by organisations and its members.

One of the most significant sources of evidence on the development of partnership is Dr. Knell's research at the Work Foundation in the UK².

Combining the insights from a survey of over 300 companies and detailed case work among 15 companies, Dr. Knell has shown that the experience of companies working through partnership is that it delivers a more flexible workforce that is focused and committed to what are seen as common or shared problems. Individuals accept more responsibility for innovation and change. As employees become more deeply involved in problem-solving there are often marked decreases in the level of absenteeism, staff turnover and industrial conflict.

Further, Irish evaluations of partnership have shown that competitive benefits arise. For example, the evaluation of the New Work Organisation programme reported that, while financial gains have not yet been quantified, managers recognised significant improvements in how

² See *Managing Best Practice Series, Number 87 Managing Partnership, Industrial Society, UK.*

orders were processed, the pace of work, the level of quality and the general organisational culture and attitude to work.³

A smaller, more detailed survey, by David Guest and Ricardo Peccei in 2001, provides concrete evidence that the advantages also exist for unions and employees. Their research highlights that the workplace becomes a more attractive place as trust, fairness, transparency and communication increase. In particular, the improvement in communication is evident in the companies surveyed.

There are also other direct benefits for employees. For example, employment security may also increase as for example in John Knell's case study at Leyland, a manager reported that 'when faced with a problem, redundancies is 170th on the list of options.'⁴ In other cases, partnership results in an emphasis, for example, on career security through support for training or re-training.

For example, a shop steward at HP Bulmer suggested that 'the development of people skills is one of the best ways of preserving employment security and employability, in that they have a transferable qualification to take somewhere else'. Job security as a shared (employer/union and employee) problem reduces the burden on individual employees and creates a more positive work environment.

Finally, research work published by the European Trade Union Institute highlights the nature and importance of financial rewards received by employees for their contribution to improved

productivity and innovation.⁵ Noel Cahill's work, published in 2000 by the NESC, provides a very useful review of various forms — including profit-sharing, employee share ownership and gain-sharing.

Table 1 summarises the improvements which, this Irish and international experience suggest, will arise when partnership is implemented.

International research, in particular in Guest and Peccei's work, focused on the 'balance of mutuality' — or the benefits partnership is delivering for each stakeholder — suggests that the question of balance remains an important one. The notion of partnership implies that mutual gains and mutual advantage will arise. However, for this to occur in practice there must be clear advantages for companies, employees and unions. Therefore, it is important that the role and needs of all stakeholders are fully considered if partnership is to work effectively.

3.2 Modernising Work through Partnership

This section considers how participative partnership-type arrangements, in practice, deliver the types of improvements listed in Table 1. It is a first look at how partnership works in practice, what is it about partnership that enables it to deliver better outcomes for organisations and individual employees.

This analysis, in this chapter, is based on the results of international case studies carried out in the UK, US and Europe. These cases point to the importance of novel participative partnership-type arrangements and begin to provide some insights into how such arrangements might lead to better performance and organisational improvement.

The chapter in this sense provides a foundation for subsequent analysis and the development of lessons and learning. It places the changes observed in the Irish case studies carried for this report (outlined in Chapter 4) in a somewhat broader context.

Using examples from a recent EU report on Industrial Relations and Innovation; John Knell's cases for the Department of Trade and Industry in the UK; and Kochan and Rubinstein's work; this section identifies four key features of participative approaches to change which go some way towards explaining their effectiveness. These are;

- Involvement in decision-making
- Emphasis on problem-solving
- Contribution to innovation
- Quality of life

3.3 Involvement in Decision-Making

Participative decision-making draws willing and able individuals and parties into decision-making at the earliest stage possible. The alternative, more traditional approach tends to involve others at late or final stages in the decision-making process.

Partnership expands the strategic capability of

³ See for example Peter Totterdill and Annette Sharpe evaluation, written in 1999, on the NWO Project.

⁴ John Knell's case studies are in a report published by the UK Department of Trade and Industry in 1999.

⁵ This is reported in the Spring 2002 issue of 'Transfer' edited by Kevin O'Kelly

Table 1: Benefits of Partnership: Summary of Evidence

Enterprise partnership delivers mutual gains for those involved in organisations, for various reasons, including some or all of the following:

- Higher levels of employee flexibility
- Acceptance that change is inevitable
- Greater commitment
- More and better quality suggestions from the ‘coalface’
- Increased opportunities to exercise autonomy and to participate directly in decision-making
- Greater emphasis on problem solving and innovation
- Lower levels of absenteeism
- Lower labour turnover
- Lower industrial conflict
- Opportunities for inter-firm networking
- Evolving role of unions and representation— for example, dealing with new issues, focus on organisational change and competitive challenges

Enterprise partnership can also mean a more positive workplace for some or all of the following reasons;

- Level of trust between employers, unions and employees increases
- Employees and unions are treated with greater fairness and respect
- The sense of employment security improves
- Unions and employees receive greater access to information about what is happening in the organisation
- Employees may improve their understanding of business priorities/agenda and strategies
- Increased training and opportunity for lifelong learning
- Greater opportunity to share in the financial gains through new reward systems

the organisation by creating new channels for involvement. Research carried out by an EU Expert Panel on ‘Industrial Relations and Innovation’⁷ uses five company case studies and in each it is clear that decision-making benefits from direct participation by employees. Further, in each case significant improvements arise because of indirect participation, that is through unions or works councils. For example, the initiative for a major reorganisation of activities at the Danish based Kelsen Bakery came from the national trade union, LO, as part of its developing workplaces project. The strategic capability of the organisation in this way is maximised to solve complex ongoing problems.

In each of the cases discussed by this Expert Panel it is clear that partnership draws those with expertise in relation to a given problem — i.e. those that are able — into the decision-making process. Employees and unions are willing to participate because, in the spirit of partnership, participation will lead or should lead to mutual gains.

3.4 Emphasis on Problem-Solving

In this way, partnership-type arrangements in a very practical and real sense views employees individually and collectively as the innovative and thinking core of the organisation. As just outlined, effective partnership as an approach to management permits those with an influence on how change occurs to do just that — change.

⁷ This work is currently at a draft stage.

The organising principle is problem-solving. Principles like control and trust remain important but the emphasis shifts to problem-solving.

In this more participative environment, managers spend more time framing problem-solving, providing the terms of reference and assisting in the monitoring process — for example, they may provide indicators of performance based on other teams or from outside the organisation. They devise and assist in training and the development of new skills for employees who are faced with new challenges. They enable problem-solvers to cut across traditional barriers to find solutions — they create new structures and new approaches that facilitate crosscutting solutions.

This re-alignment of activities around the principle of ‘problem-solving’ is evident in John Knell’s research at the UK engineering company Dominick Hunter Group. For example, quality is no longer seen as the responsibility of an isolated QC department. As partnership has developed in the company, production staff have taken responsibility for quality maintenance. The focus is on the problem of production “in the round”, that is as something which is not divorced from quality. At the same time, the role of quality assurance, in the company, has evolved to take on a less ‘policing’ role to a more ‘investigative’ role.

Quality is something the production employees take responsibility for because it affects their ability to do their job and they can acquire, through training, the skills to do it effectively. The AEEU, which represent around 30% of workers in the company, hold regular meetings at depart-

mental level with the operational managers. Management would also seem to be guided by the need to solve problems effectively rather than by any simple views about the trade-off between the need for control and the ability to trust.

However, even within the most established partnership cases this ability to pull together resources to tackle issues is extremely challenging. The experience at Saturn provides an illustration. Part of the General Motors group in the US, Saturn is probably the best known example of partnership. The experiences at Saturn in the early 1990s provided an insight into the crosscutting issues and illustrated the complexity involved in this area. Despite extensive experience with teams Saturn failed to develop an effective ongoing ‘Off-line’ problem-solving approach which could address issues that exceeded the scope of authority, resources, or tasks residing within specific teams. A union initiative to develop such an approach, to tackle a cost crisis in 1992, generated over 1000 suggestions but floundered because of lack of follow-through and leadership. In 1993, management and union joined forces but this initiative also struggled to gain widespread support. Analysis among employees pointed to a failure among the leadership ‘to walk-the-talk’ and also to issues of organisational culture. Thus, even at Saturn in the 1990s crosscutting problem-solving had proved an extremely challenging goal.

Partnership as an approach to the management of problems is complex. It is not a neat solution. It draws able and willing individuals and groups, including unions, into decision-making but offers

little by way of structured advice. The contribution is to bring participants to the table and in doing so to provide scope for innovation that can lead to mutual gain.

3.5 Contribution to Innovation

Working in the manner just outlined, partnership-type arrangements provide a mechanism in which participants can engage in effective debate about specific work problems — for example, solving complex production problems; developing innovative solutions to customer demands; developing health and safety procedures and debating equality of access to training, childcare and lifelong learning.

Discussing these issues in partnership means, at the very least, that more views are considered, debated and understood. Operating in this manner, partnership increases the scope for innovation, for individuals to take some risks and for new views and opinions to be placed on the table.

Drawing again on John Knell’s casework it is possible to provide a concrete example. HP Bulmer, the UK-based cider maker, established an Innovation Centre in 1998 to explore, in a participative atmosphere, new products and new ways of working. Linked to this Centre is an ongoing continuous improvement initiative called BIG (Bulmer’s Idea Generator).

Through the Intranet employees feed in new ideas. This will often concentrate on critical challenges facing the business, through the ‘Campaign of the Moment’.

3.6 Quality of Life

To sustain participative, problem-solving and innovative thinking within companies there is a need to balance the individual and collective needs of employees — for example, their concerns in relation to family, education, health and transport — with the competitive and economic needs of the organisation.

Achieving this balance within the company is linked to efforts to improve the working environment. For example, in almost all of the 15 case studies in John Knell's work there is evidence that companies are improving the work environment.

However, quality of working life is not confined to conditions within the workplace. Improving working life is a challenge for employers, unions, government and its agencies.

3.7 Conclusion

This chapter highlights the contribution and role of enterprise partnership-type arrangements. They can deliver mutual competitive and social benefits by making decision-making more progressive. It is more progressive because the interests of those affected by change are considered earlier in the decision-making process. In doing so, partnership has the potential to maximise the strategic capacity of the organisation because those willing and able to participate — that is unions and individual employees, do participate in decision-making which is problem-orientated and focused on innovation.

The challenge going forward is to make optimal and appropriate use of this strategic capacity. To do so, it is important to continue to develop a clearer understanding of the meaning of enterprise partnership in specific contexts; to analyse how partnership can deliver superior mutual gains relative to alternative approaches; and finally, to begin to explain how organisational change and modernisation can occur more effectively.

Working Together – For Change and a Modern Workplace is an important step in this learning process. This chapter has drawn upon national and international research and evidence to illustrate the wider context and interest in approaching change in a more participative manner.

The following chapter examines Irish organisations working with partnership-type arrangements. These four cases provide vital insights into the detailed operational challenges associated with partnership and its development as effective problem-solving methodology in an Irish context.

Case Studies

Overview and methodology

This chapter presents the partnership experiences of four organisations. The selection of these four organisations occurred through close consultation with key industry and partnership experts and through discussion with individuals in companies and unions. The challenge during this stage of the research was to identify companies with extensive and continuing experience in relation to major change through partnership.

The companies were chosen as critical cases. This means that they were deliberately chosen because they would provide insight on the development of enterprise partnership.

They are ground-breaking companies in the sense that they are among the early adopters of partnership in an Irish context — all of the companies have at least 4 years experience of using partnership principles. The companies have built on this early experience with partnership, and have worked hard to expand and develop its role in the context of competitive environments and to shift the focus from structures to improving the performance of the organisation and the welfare of employees.

The companies are not presenting themselves as success stories. For each many challenges remain, however, their experiences of achieving organisational change through partnership is significant.

The final selection of cases was also influenced by the need to provide a sectoral and geographical spread of experiences. The case studies are drawn from companies of different size ranging from Small/Medium to Large, and represent the manufacturing, processing, and service sectors. Both Irish-owned and multinational organisations are included, and both urban and rurally based organisations feature also.

Case Study 1

Tegral Metal-Forming Ltd

Significant organisational change has been introduced at Tegral Metal Forming through partnership. Work has been re-organised to deliver substantial improvements in both the performance of the company and the welfare of employees.

Developments of interest at Tegral Metal Forming include the re-organisation of work around a skill-based pay system and the implementation of an effective and progressive gainsharing system.

The Company

Tegral Metal Forming Ltd (TMF) is part of the transnational ETEX group. TMF itself came into being in 1977 as part of the then Tegral Holdings Group, that in turn was acquired by ETEX in 1988. Based in Athy, Co. Kildare, TMF currently employ some 80 people and its main activities are cold steel forming, and supplying steel roofing, cladding and flooring products almost exclusively for the Irish market. At present the manufacturing and clerical staff are organised by SIPTU, and craft personnel by TEEU.

The Partnership Context

In 1996/1997, the company faced the major challenge of implementing significant organisational change. A number of factors such as the emergence of new competitors, demands for enhanced service from customers, the prospect of the EU working time directive (TMF had a heavy dependence on overtime working), and increasing aspirations of the workforce led to a debate within the organisation as to how to progress forward and provide an impetus for change. This debate coincided with the development of a NWO (New Work Organisation) initiative at a National level co-ordinated by the Irish Productivity Centre (IPC), and management and unions decided jointly to participate in this initiative. The overall objectives of the programme were to promote the profitability and economic well being of TMF through innovative work practices, job satisfaction and staff development.

The Structures

To co-ordinate the process, an overall partnership forum was established which contained representatives of management and unions (including external union officials). The day-to-day work was completed by a steering committee of eight people representative of key union and management decision-makers, and various joint task teams established to address particular issues highlighted by the steering committee.

An external facilitator was employed to support the process initially, but his role lessened in importance as the partnership process developed and the internal stakeholders gained ownership. Training was provided to the steering committee in appreciating partnership principles, problem solving, and the conduct of meetings among others.

The Activity

The process was kick-started by task teams tackling a number of areas. For example, one team considered the strategy that TMF should employ in relation to its scrap and put in place concrete actions to address this. Another team examined the implementation of a new IT system and made recommendations as to how it would be introduced. The addressing of core business issues that were reasonably 'safe' helped to buy the process credibility, and get some results, but both sides were also using these to build trust and become used to working in this way with each other.

As a result of this initial activity, which worked well, there was general consensus that the process should be moved further forward. A decision was made to establish a team-based structure in one part of the plant, and to ring-fence it for a year as a pilot. This structure was introduced with a team leader, a guarantee was given to employees that earnings would not be lost, and a gain-sharing scheme was designed which was based on sharing the gains based on the cost per tonne produced. The experiment involved significant commitment from both management and employees, and really tested the resolve of those involved in the process. The steering committee and overall partnership forum was useful in helping to resolve issues that arose even though most were resolved at the team level.

The initiative was generally successful, and the company introduced an NWO 2000 initiative which established a team-based system across the plant, implemented a jointly agreed pay system based on skills levels, and used a gain-sharing system based on the cost per tonne mentioned earlier. The change in roles from charge hands to team leaders was a significant one, but generally the system has worked well, evidenced by the fact that the new arrangements are generally viewed more positively than the old one.

However, one aspect that did not work well initially was the gain-sharing system. Part of the reason for this was that the teams were not satisfied with the cost per tonne measurement, having traditionally regarded volume generated as the relevant KPI. It was agreed to establish a joint team to re-examine this issue and recommend an alternative.

As a result, four KPIs (Key Performance Indicators) were jointly established that the teams needed to meet. These were cost per tonne (productivity), hours lost (safety), customer complaints (quality), and delivery time (customer service). A joint monitoring team, consisting of the manufacturing team leader and a member of each of the six

teams, receives a presentation from each of the teams on a monthly basis on how they have performed against these indicators, and determines the gain on that basis to be shared based on the labour budget. This system is now working effectively.

The Benefits

The partnership process at TMF has undergone significant change. From an initial starting point of strong emphasis on structures such as the partnership forum and steering committee, the focus has now shifted to improving the performance of the organisation and the welfare of the employees. TMF cites the main benefits of this approach as being:

- The company introduced significant organisational change, and employees had a significant say in the organisation of their workplace.
- The company now has a stable work organisation capable of being responsive to customer's needs. Employees now have a greater understanding of the customer and market demand. This has arisen partly also as a result of contact with other companies in work organisation initiatives. TEEU have come on board with an annualised hours agreement, and the Office employees now have a team-based system also.
- Overtime has been almost eliminated in the plant, and the length of the working week has decreased for most employees. This has led to a significant improvement in quality of life.
- Very little time is spent on IR issues. While there is an implicit understanding that IR issues are dealt with separately, in practice this is not necessarily the case and task teams have on occasions resolved these issues themselves. Release of management and union reps' time for more constructive activity is a resource not to be underestimated.
- The company has implemented an ERP (Enterprise Resource Planning) system, a further ingredient of change, with an understanding by all of the reasons for its implementation. The relative ease with which new work practices can be adopted is a direct result of the partnership process.
- The costs of the organisation have been stabilised, and employees now have real input into their work, as well as enjoying a degree of flexibility, an innovative gain sharing arrangement, and reduced hours of work.

Case Study 2

Aughinish Alumina Ltd

Aughinish Alumina in the early 1990s was losing \$1m per week. However based upon a committed and increasingly sophisticated approach to change and cooperation, Aughinish Alumina is in 2002 one of the most efficient alumina processing plants in the world. This enhanced competitive ability has occurred alongside significant improvements in the terms and conditions of employees.

Developments of interest at Aughinish Alumina include the introduction and development of team-based working arrangements, the creation of a positive and constructive working environment and recent ongoing efforts to mainstream partnership as a viable and sustainable approach to organisational change and survival.

The Company

Aughinish Alumina Ltd (AAL) is an alumina refinery located at Askeaton, Co. Limerick, designed to extract aluminium oxide from imported bauxite. It is part of the Glencore Group, a Swiss-based natural resource group with worldwide interests including an interest in two other alumina refineries. The plant processes approximately three and a half million tons of bauxite per annum, in order to extract approximately one and a half million tons of alumina, which then goes to a worldwide market for smelting to metal. AAL itself was established in 1983, and has 435 employees, 20 apprentices and 20 temporary employees. The unions on site are SIPTU, AEEU and TEEU.

The Partnership Context

Aughinish Alumina's competitive advantage is derived from its ability to produce more alumina with fewer staff than comparable plants worldwide. Given that the plant is located far from its raw material sources, AAL has to place a strong emphasis on effective people management and employee relations in order to ensure that the plant can fully utilise the attributes of its entire staff to meet production targets.

Prior to 1993, the AAL plant displayed a climate of adversarialism, with a hierarchical organisation and poor company/union relations. In 1993, a company-wide restructuring plan was agreed and implemented in a crisis situation in which the cost per tonne produced needed to be reduced significantly to ensure medium to long-term survival. A team-based structure was introduced, the

structure was flattened to just three levels, and a new internal strategy needed to be put in place to ensure that business targets could be met.

Over the rest of the 1990s significant advances were made in this regard. Through co-operation between the company and the unions, in an informal partnership arrangement, conditions of work were largely harmonised. An annualised hours system of working was introduced for all unionised employees.

An ethos developed within the organisation of the establishment of joint teams to address particular issues. Teams were formed, received appropriate training to complete their task, and then disbanded when the task had been completed. The company began to disseminate certain business information more freely, and employees knowledge and understanding and capacity to be involved in decisions concerning many facets of their work increased considerably. While a formal partnership forum did not exist, co-operation between unions and management was largely informal and meetings could be called by either side to discuss an issue.

All those employed at AAL acknowledge that there were always ongoing issues which needed to be resolved, but that the way in which they were addressed had fundamentally changed, and a genuine co-operative ethos had emerged to replace the previous conflictual one, based on trust and mutual respect.

Further Development of Partnership

The advent of Partnership 2000 focused both management and unions on the concept of partnership, a word that had been loosely used to describe the AAL experience since 1993. Activity was stepped up on two fronts. Firstly, a joint team attended a partnership training programme facilitated by ETS (a trade union research and training organisation) to learn about the fundamental concepts underlying partnership. This reported back to a joint forum and as a result of subsequent discussions, it was decided to develop a customised programme for 26 personnel representing senior management, co-ordinators/facilitators, shop stewards, full-time union officials (should they wish to avail themselves of it), and staff. This 6-module programme provided the opportunity to reflect on the experience since 1993, and allowed the participants to develop their understanding of what partnership could be.

As a result of this process, every team in the plant was briefed on the programme, and has been consulted in relation to its members' views on what partnership at AAL could be in the future. This feedback is in the process of being assimilated at the time of writing, and a coherent strategy going forward will develop as a result.

Secondly, a number of joint teams have begun to address issues of increasing importance within the plant. These teams are separate from the production teams formed within the formal teamwork structure and are cross-functional. The teams formed included:

- A pensions team was formed and successfully put in place arrangements to provide options

for retirement from age 50, based on employees transferring their PPF 2% entitlement to the pension fund, and a commensurate company contribution being forthcoming also.

- A business process improvement team was formed and its emphasis is on improving business processes through, for example, ensuring that each employee has access to data that can enable them to make informed decisions in their roles. Pilot approaches are currently taking place in process areas within the plant.
- The possibility of a gain-sharing arrangement has also been discussed in this context.

- Innovative projects addressing areas such as active ageing, with the assistance of a dietician, were also introduced.

While there are differing perspectives within the plant on how far the partnership process can progress, unions and management have been, and continue to be, willing to participate in the journey so far. Compared to the instability of the pre-1993 situation, this progress based on a partnership ethos, even with certain drawbacks, has produced more tangible results for both the company and its employees.

The Benefits

The benefits to both management and the employees are significant:

- AAL has addressed major organisational change issues using formal and informal partnership approaches, and as an organisation has become more competitive, guaranteeing better security of employment and enhanced terms and conditions of employment.
- The industrial relations climate stabilised, and indicators such as number of grievances have decreased significantly
- Production costs per ton are stabilised, and AAL has strengthened its competitive position in the marketplace
- The roles and responsibilities of employees have changed in such a way that, within the team-based structure, they now have more input into the decisions that affect them and the organisation
- The process itself has become more efficient, with less waste
- The working relationship with the workforce is by and large positive and constructive
- Security of employment for AAL's employees has been strengthened, and significant innovation in working arrangements, such as annualised hours agreements, achieved. This has been a key feature in enhancing the quality of working life for those employed at the plant
- Training and development focused not just on technical skills but also on so-called soft skills such as teamworking, conflict resolution, and facilitation skills.

Case Study 3

Dairygold Co-Operative Society Ltd

Partnership has enabled particular business areas within the Dairygold organisation to respond effectively to rising production cost inflation, tighter margins and consumers that are more sophisticated. Organisational change and enhanced performance has delivered tangible benefits to all of those involved in the partnership process.

Important developments within the Dairygold organisation include the approach to change, a structured gain-sharing agreement, job security, and the diffusion of experience with partnership throughout the organisation.

The Organisation

Dairygold Co-Operative Society Ltd (DG) is one of Ireland's premier food companies with sales of 960 million Euro in 2001. It employs approximately 3,100 people. DG's Headquarters is based in Mitchelstown, Co. Cork, but with production and retailing/trading facilities in Ireland and the UK, DG is an organisation with multiple sites and production facilities. Its operations are focused on the following:

- Dairy products such as cheeses, butters, powders and ingredients
- Beef
- Pigmeat
- Agricultural products such as fertilisers, feeds and farm requisites, and
- Retail Operations – DG has its own chain of retail co-op stores.

DG has undergone significant change in the last ten to fifteen years, including the merger of Ballyclough Co-Op and Mitchelstown Co-Op to form DG itself in 1990. DG is a multi-union environment with the organising unions being TEEU, SIPTU, MSF, AEEU, DEA (Dairy Executives Association), and MANDATE.

As a prelude to describing partnership-type activity within DG, it is important to bear in mind that in an organisation of this type, with a series of brownfield rather than greenfield sites, change can often be difficult to achieve for a variety of reasons. In some areas of DG, there are ongoing difficulties in relation to negotiating change and traditional positions are adopted, while in others change initiatives have been more successful. DG is an example of an organisation where partnership-type initiatives have grown organically, and this brief profile reflects on these initiatives. It is important however to stress that they are not necessarily representative of the whole organisation, and yet are all the more interesting because of that.

The Partnership Context at Galtee

Galtee Meats Pigmear plant in Mitchelstown, employing 420 people on site, has seen a partnership-type initiative in existence for ten years. Faced with rising production inflation, tighter margins, and more sophisticated consumers, Galtee set about ensuring that it remained competitive in the marketplace. Part of this, in the early 90s, included contracting out certain operations such as the canteen to ensure cost stability. When considering options for the maintenance area, management and unions together devised an alternative strategy, that of establishing an autonomous work group. Based originally on the initiative of the union, as an alternative to decreasing the maintenance workforce, the idea was that the maintenance employees would manage and run the maintenance function within the plant on the basis of a self-managed work team. They have responsibility for budgeting, planning of work, and liaising with production. They schedule their own holidays and working hours (within certain constraints). They have their own team leader who negotiates the annual maintenance budget with management. The financial savings on budget are shared between the company and the employees, with the first 25,400 Euro split 3:1 in the employees' favour, and beyond that a 50:50 split.

The Results for Galtee

The results have been impressive for both the company and the employees. The employees have come in below budget every year. Despite a doubling of the pig kill in the last ten years, only one more full-time maintenance employee has been hired (bringing the total, excluding apprentices, to 18). The maintenance manager has been released to work on more strategic issues. The employees now have more control over their own work and stand to gain financially as a result of their efficiency. Issues such as cross-skilling and multiskilling have been dealt with by the group internally on the basis of what's the best way to complete the work most effectively. There has been only one disciplinary problem in the last ten years with the group. They are also quite discerning in relation to, for example, training courses they attend, assessing them rigorously on the basis of the added value they can bring to the group. A key factor in the group's success has been the fact that there was a strong champion on the union side who remains with the group to this day.

The Extension of Partnership-Type Initiatives to Other Parts of the Organisation

The comparative success of this initiative has led to innovative options being considered in other parts of DG. SIPTU have registered more than 20 team-based partnership agreements within the organisation, although they vary in nature according to the circumstances. For example, in the prepack operation for cheese in Mitchelstown (where blocks of cheese are cut up into smaller sizes ready for packaging), a situation arose where that part of the business was becoming uncompetitive. The organisation was faced with three options: contract out the work, continue in the same way and eventually shut down, or reorganise in such a way that both the organisation and the employees were guaranteed a future within the business.

After a significant amount of consultation between management and union representatives, and communication of relevant information by management such as the financial rudiment of the business, an agreement was reached with the union that the work be reorganised on a team basis, but with the employees guaranteed a basic wage and a gain based on the number of boxes of output produced. Now, the manager meets the employees to brief them with the relevant business information, and an employee representative chairs the meetings. They manage themselves on the day-to-day running of the business primarily. Output is maintained despite the fact that there has been an agreed decrease in employee numbers (either through voluntary redundancy or deployment to other parts of DG's business),

and absenteeism rates have decreased significantly. There has also been significant capital investment by the company in new machinery to facilitate this.

Similar agreements have also been reached in the cheddar operation (where cheddar cheese is made), and also in the process cheese operation (where bulk lots are prepared for processing or packaging). They have not been without difficult moments, and the process of negotiating these partnership-type arrangements can be quite arduous, particularly as, at the time that this is being done, sufficient trust between both sides is not yet necessarily fully established. In certain instances, employees are not ready or willing to take on the responsibilities associated with operating such arrangements effectively, or managers are at best reluctant participants who feel their own roles are under threat.

All parties, however, suggest that the key to establishing and maintaining successful partnership arrangements is the regular flow of information, and the continuing building of trust between management and unions.

In establishing these agreements within DG, the availability of persons internally experienced in relation to partnership-type arrangements has been quite helpful. For example, the autonomous group facilitator from Galtee has facilitated the establishment of a number of the arrangements in other parts of the organisation.

The Benefits

The DG experience in relation to partnership-type arrangements is that these have:

- **Facilitated organisational change towards enhanced performance in particular business areas. The initiatives within DG are focused on achieving organisational change and modernising the workplace to the benefit of all concerned**
- **Promoted adaptability and flexibility as a key to business success**
- **Introduced structured gain-sharing/ productivity agreements**
- **Assisted in guaranteeing security of employment in increasingly competitive markets, and**
- **Increased employee involvement and the ability to influence business decisions.**

Case Study 4

Jurys Doyle Hotel Group

The approach to partnership at Jurys Doyle provided an important competitive advantage for the Hotel Group in its response to the problems experienced in the industry in late 2001 and into 2002. It enabled Jurys Doyle to respond with greater flexibility to the developing crisis and ensured that the need for the strategies and actions undertaken were widely understood and supported.

Important developments at Jurys Doyle include the development of a more innovative culture among employees, the mainstreaming and diffusion of partnership as an approach to change and the approach to sharing gains within the Group.

The Company

Jurys Doyle Hotel Group is Ireland's leading hotel group. It employs approximately 4,000 people in 32 hotels throughout Ireland, the UK and the US. A further five additional hotels are under construction in the UK and US. Sixteen of the hotels are located in Ireland, employing approximately 2,600 people. The Company operates in city centre locations, and is primarily focused on the corporate market. The organisation has undergone significant change and expansion in the last ten to fifteen years, including the development of the highly successful Jurys Inns concept in 1993 and the acquisition of the Doyle Hotel Group (including such properties as the Westbury, Berkeley Court and Burlington Hotels) in 1999.

The Partnership Context

Jurys Doyles' competitive advantage is derived from its ability to respond rapidly to customer needs, and its business is a people-oriented one. With the rapid expansion in the Irish economy from the mid-1990s, and the expansion of the group itself, both management and unions recognised that changes needed to be implemented which would enhance the input of employees and the competitiveness of the organisation. This was reinforced by the effects on the industry of the Gulf War, which resulted in a dramatic reduction in visitor numbers, with a consequent impact on business. It led to a realisation that a range of set customs and practices which did not necessarily promote flexibility and customer responsiveness needed to be changed. These customs and practices applied as much to management's approach as they did to the unions. It was also widely recognised that in order for an initiative to have credibility within the organisation, it needed to be strongly supported by the union, SIPTU.

The Structures

In 1998, such an opportunity arose. SIPTU received support from the EU under the ADAPT programme to examine the issue of workplace partnership, and to pilot some initiatives. Jurys Doyle was approached to participate, and nominated its flagship Jurys Ballsbridge Hotel employing approximately 500 people at the time. The employees are represented by SIPTU at the hotel.

A partnership steering committee was formed, consisting of five management and five union representatives, and an independent facilitator was employed to support the process. The role of the facilitator lessened as the process developed momentum. It was challenging at times to maintain momentum when steering committee members changed, as new members needed to be brought up to speed on the process. What was particularly significant was that the team included the general manager on the management side, and other senior managerial representatives. The team also included key union personnel who could clearly be identified as champions of the process.

The Activity

In the initial stages, the steering committee focused on team dynamics and building trust. Formal and informal training in areas such as decision-making and communication skills facilitated this process. Also, union representatives received training to assist them in understanding financial information, for example, so they could make meaningful contributions once they fully understood the company's financial position. All IR issues in existence at the time were "ring-fenced" and dealt with in the normal way. The aim was that future issues of this nature would be dealt with through the partnership process. The importance of communication was emphasised, and the steering group briefed all employees in the hotel on the partnership group and its function. Minutes of all meetings were put on the appropriate notice board and sent to all employees with their payslips. Department partnership committees were established in areas such as banqueting, accommodation and the kitchen to actually carry out the detailed work. All parties agreed that a series of quick wins were required to give the process credibility.

The practical work carried out by these committees was significant. For example, a pilot job-sharing initiative was carried out in the accommodation and reservations sections of the hotel, and was sufficiently successful for it to be introduced on a permanent basis after the pilot period.

Employees began to have greater input into decisions affecting their work. Housekeeping personnel were consulted at the design stage when rooms were redesigned, and this enabled practical issues of concern to them to be addressed. A new reception area was designed and all those with a capacity to advise on the best way of achieving the objective were involved. Productivity deals were also addressed using the partnership mechanism, including one which involved gain-sharing for front desk personnel in return for a reduction in their manning levels.

The actual way of conducting business within the hotel itself began to change, and the relationship between management and unions began to change also as trust was established at all levels. A SAYE (Save As You Earn) scheme was introduced in 2000. When issues such as the Foot and Mouth crisis emerged, the existence of the partnership committee offered a vehicle to all sides to help them to understand the impact on the business, and the strategies that needed to be adopted in order to survive crises of that nature. This was further emphasised in the aftermath of the events of September 11th last year. The organisation's partnership approach helped it to compete well against its rivals during an extremely difficult period for the industry.

The Jurys Doyle group recognised the value of this approach, and two of the union members on the steering committee were seconded for a period to brief the other hotels within the group on the approach. This offered an excellent opportunity for the other hotels to raise issues that were of concern to them, and as a result, for example, the sick pay scheme has been standardised. In the Berkeley Court Hotel, Ballsbridge, department meetings have been established as a result of the process, and the communications process within the hotel has improved significantly.

The process, like any process, has had its ups and downs, and needs to be constantly monitored and reviewed. The original steering committee structure is constantly updated, as are the compositions of the local partnership committees and their focus of activity. A significant amount of the partnership approach has been mainstreamed into the way the hotel does its business on a daily basis.

The Benefits

The main benefits of the partnership process have included:

- **An enhanced capacity to respond to market changes, through appropriate organisational change. The steering committee and local partnership committees have tackled difficult issues and resolved them through a partnership approach. In a fast-changing customer-oriented business environment, this is a significant achievement of the partnership process**
- **Higher levels of trust between management and unions. The spin-off benefits of this are evidenced in the relationship between the two on an ongoing basis**
- **The development of a more pragmatic approach to problem-solving. Better quality solutions are now devised as a result of involving all key stakeholders in the development of a solution**
- **The identification and delivery of shared benefits. The process has delivered more cost-competitive and flexible working arrangements for the organisation, and has provided employees with an opportunity to influence decisions that affect their work and with the possibility of financial reward as a result of certain initiatives.**

Partnership Learnings

Introduction

This chapter examines the experiences of the four Irish companies, outlined in Chapter 4, and other experiences in Ireland with partnership and change. It draws learnings from those experiences, and categorises them under various headings for consideration.

5.1 Origins of Partnership Initiatives — Key Drivers

Partnership-type initiatives arise for a variety of reasons. Partnership is now considered one of the valid routes by which companies and unions can respond to competitive problems — such as dealing with operating cost inflation or the development of responsive marketing systems. In all of the cases studied in Chapter 4, partnership is a response to significant change in either the external or the internal environment of the company.

The potential for partnership to improve organisations and facilitate change is recognised and championed in different ways. In each case the initiative or support for partnership comes from one or more of the following sources:

- the company — views partnership type initiatives as an innovative and important way to add value, to improve organisational strategy and to achieve change

- the union — views partnership as an appropriate means of solving problems and/or securing participation which can deliver mutual advantage
- joint discussions — management and unions both see added value inherent in developing a deeper relationship, in particular in the aftermath of a dispute
- outside agencies — the influence of ICTU, IBEC, the advisory service of the LRC (Labour Relations Commission) and the Labour Court, in many cases also exert an important influence on decisions to consider partnership as an alternative approach to change.

It is also important to note that the inspiration for partnership is often more informal or organic. In many instances, a natural form of partnership emerges. The organisation, for instance, develops joint teams because they are the most effective way of addressing business issues.

5.2 How Partnership is Implemented — The Structure Debate

The case studies show that there is no one model of partnership. Partnership in each case is customised to specifically fit the requirements and needs of the organisation in question. However, it is possible from the cases to identify general profiles or patterns which can be loosely described as formal and informal.

5.2.1 *Formal or structured approach to partnership*

Often an organisation will develop a partnership structure involving an overall partnership forum or steering committee, which is composed of management and union representatives and may include representatives of the non-unionised workforce. A series of task teams are then established to address particular issues. These task teams are composed of those who can directly affect the implementation of the solution

in relation to a particular issue. The steering team meet frequently initially, and there is a gradual handover to the task teams to complete the detailed work. In these cases, a formal partnership agreement will often be concluded between the organisation and the unions, which may contain the following:

- A statement of union and management aims for the enterprise
- The interests and issues to be covered by the agreement on partnership
- The processes and structures for involvement by the union and employees in information, consultations and decision-making
- A statement clarifying the relationship between the IR process and the Partnership process
- A facility to review the partnerships progress
- Formal joint commitment to the partnership.

5.2.2 *Informal or Organic Approach to Partnership*

In many cases, organisations regard themselves as having a partnership ethos in place (an informal partnership arrangement). In such cases the way they conduct their business corresponds to the partnership principles outlined earlier, but their structures may be minimal. They might have joint task teams, for example, or have an autonomous working group as in Galtee Meats. Often, the partnership process is discussed at regular union/management meetings, or informally between the HR Department and workplace representatives.

Neither approach represents a template or model for partnership, as each organisation needs to develop a format appropriate to its own needs. In building any model, it is valuable to pay attention to the lessons and experiences of other companies.

Among the experiences outlined by interviewees it was clear that many were cautious of an overemphasis on structures to the detriment of productive activity. For example, one manager argued that steering committees are very important in the early stages of a partnership process, but their role should change with the process itself. Structures were seen as important initially in helping build trust between the parties, however structures must be dynamic, and should reflect the progress of the partnership approach at a particular point in time.

Finally, where informal approaches are used, the term partnership is not just applied to what might be purely a company initiative. For example, one manager noted that it is possible to have a team-working system in place, without having a partnership ethos in the organisation.

5.3 **Getting Started**

How do organisations start their partnership initiatives in practice? There is no one way to do this, but the following are practices that have been successfully employed.

Many commence by assessing their competitive position in relation to other companies — for example with other companies in their group, with competitors, suppliers or customers. This

self-assessment process is in practice a careful analysis of the company versus others. The boxed inset outlines the types of issues which companies and unions may consider when assessing the level of enterprise partnership on a voluntary basis.

A combination of this self-assessment exercise, matched against priorities from the organisation and the union point of view, can prove a useful starting point for determining action plans.

Self-assessment – Monitoring and Evaluating Criteria

- Competitiveness, adaptability, flexibility and innovation in the enterprise
- Better systems of work organisation
- Training and Personal development linked to lifelong learning
- Equality of opportunity and family-friendly working policies
- Problem solving and conflict avoidance
- Occupational safety, health, and welfare issues, including physical environment improvements
- Information and consultation
- Time off, facilities, and training for staff representatives
- Forms of financial involvement

Derived from Section 1.3, The Programme for Prosperity and Fairness

Some organisations will form a task team whose role it is to report back to the steering committee on the best way forward. The team will examine a range of issues, and may go as far as completing surveys within the workforce itself to identify current priorities. An action plan is then developed as a result. This can also establish a benchmark against which future progress can be measured.

Others, who operate partnership arrangements informally, begin with the development of joint teams to address particular issues of concern within the organisation. Very often, this will arise as a natural extension of team-working.

The joint teams may begin to address particular performance issues within the plant, or joint input into the purchase and design of a particular piece of machinery.

Where the initiative has arisen as a result of a crisis, and a change agreement underscored by partnership principles has been put in place, then the commencement of the new working arrangements is effectively the start of implementation.

Whatever method is chosen to kick-start the process, it must be appropriate to the needs of the organisation at that particular point in time, and, in more formal processes, must give a chance of an early win arising from the initiative. It must also ensure buy-in from the principal representatives of the union(s) and the employer while striving for wide support at shop floor level and among middle management. This enhances the credibility of the initiative as action-focused, with benefits to both employees and employer.

5.4 The Dynamics of the Process

When a partnership process is established, organisations have different ways of ensuring that it stays on track. These are not necessarily key success factors; just useful lessons learned by organisations involved in partnership activity.

- Partnership requires the commitment and support of employees, unions and senior management. Without serious commitment from all levels, especially senior management and other influential figures, partnership is likely to become simply a talking shop
- Training is central to the process, and appropriate training interventions should be jointly identified and sourced so that they can be most effective in assisting the process to achieve its objectives
- Confidence in partnership is important. Focus on a quick win; it inspires confidence in the process. Where a process has begun with a focus on too many initiatives at too early a stage, it is inevitably doomed to failure
- Patience — more than anything, cultivating a partnership approach is about being patient at the outset when the approach is being established
- Meetings should have a purpose. Partnership meetings should not be held just for the sake of holding them. It is important to send out the message to everyone that partnership is a serious initiative, and will be treated like any other initiative in the organisation

- Communication lies at the heart of effective partnership processes. Almost all difficulties that arise in this context can in some shape or form be linked back to poor communication. In this context, open, honest meetings where people can air their views and, at least at times, not take themselves too seriously, is an important dynamic in the partnership process.

5.5 Communications within the Partnership Process

Most organisations cite communications and trust as key ingredients of partnership. This can be clearly seen in the case studies. Effective communication strategies have been identified as being important:

- Within the partnership team itself. It is important that those directly involved communicate not only at formal meetings, but also informally about the developments within the partnership process
- Between those involved directly in partnership-type activities and those somewhat at a distance. The partnership process should be clearly communicated, and the benefits should be clearly communicated. This is particularly important for senior managers and union representatives not involved in the process on a day-to-day basis
- Between union representatives involved in partnership and the general workforce. This is important as a two-way communication mechanism to ensure ongoing buy-in, and also ongoing feedback on the process

- Between management representatives involved in partnership and other members of the management team, including supervisors and middle managers. This is important as evidence suggests middle managers and supervisors feel most threatened by these types of processes.

Communication mechanisms vary depending on the climate of the organisation, and the type of partnership process it has in place. Some of the following have been included:

- Briefings by workplace representatives to members on a formal and informal basis. This is often effective if completed in small groups
- Communication of key business information to employees to enable effective understanding of the business situation, and training in the tools to understand this information as indicated earlier
- Design of special partnership newsletters, or integration of the results of a partnership-type initiative into the main company/union newsletters
- Regular communication between the champions on both sides to assist in driving the process forward
- If the organisation has an Intranet, posting news of partnership initiatives on this.

5.6 Training

It is clear that in any partnership process, appropriate training interventions improve the effectiveness of the process. The nature of training and development reflects the particular circumstances of each company. As partnership grapples more directly with change training is also challenged to develop a deeper understanding of the nature of change and the forces — both internal and external — which underpin change.

At the initial stages, some deeper understanding of the concept of partnership itself is necessary, so that all parties have the opportunity to progress from the same base line understanding. This seems to be acquired either through formal training or by learning from experiences, for example visits to other organisations. Much of the initial focus is on the development of trust between the parties. Training in areas such as consensus decision-making and conflict resolution seems to be particularly helpful in this regard. Sometimes, by getting all members of the team together at an early stage, it not only serves to provide training interventions, but also allows them to air issues informally in a safe environment.

There are a certain number of basic tools that can enable people to operate effectively in a partnership-type manner. Understanding financial information, business awareness, meeting skills and presentation skills, among others, are important in this context. The importance of joint training in developing confidence among all stakeholders that the process can succeed is not to be underestimated. When project teams/pilot teams/joint task teams are established, they

sometimes need expert training in project management skills, or perhaps facilitation skills. Training on effective team-working is another area here that has proved beneficial.

The experience of companies suggests that training and development is most effective when it responds to the specific needs of the company. The companies in this research have assessed the provision of partnership on a rigorous basis. In particular, the ability of partnership to contribute to change for the core business and the employees is a critical factor.

The challenge for training and development is to evolve to ensure that partnership can facilitate an increasingly complex and significant programme of change — for example, change in a given company may require more advanced approaches to partnership training which tackle issues such as advanced HRM, crisis management and international economics.

5.7 The Use of Comparative Self-Assessment in the Partnership Process (Benchmarking)

One of the primary ways of learning about partnership has been through comparative self-assessment or benchmarking. It has been used at various stages in the partnership process by different organisations. It has been used for the following purposes, and with the following results:

- When management or unions visit companies to assess their competitive abilities they will often come across productive partnership arrangements. This can often be the impetus

to consider such an initiative in their own organisations

- When developing partnership approaches within one's own organisation, it's useful to visit others who are a little further advanced to obtain an external perspective on issues such as structure, areas addressed and benefits
- When task teams are about to undertake their activity on particular work issues, visiting appropriate benchmark sites for their particular area of activity can be useful
- When the organisation is about to embark, or already embarked, on a major change initiative, visiting other sites can be useful to determine best methods of work organisation etc.
- Hosting visits by other companies and unions has also proved useful, as it gives an opportunity for a significant number of those involved in the partnership initiative to meet other organisations, and also confers on the partnership initiative a type of internal status which can be important.

5.8 The Use of External Facilitation in the Partnership Process

This is an area often raised by companies when embarking on a partnership process. The experience and advice varies and companies embarking on partnership will need to decide upon the appropriate level of external advice.

In a number of formal partnership arrangements, heavy reliance is placed on an external facilitator in the initial stages. This is because as an inde-

pendent third party, they may have experience of facilitating partnership in other organisations, and can be used to facilitate the steering committee, and sometimes the working groups, as well as being available as a resource to both sides, suggesting benchmark sites etc. The key here is to determine how long it is necessary for the external facilitator to fulfil that role, and to ensure that it does not ultimately inhibit rather than help the partnership. Experience suggests that the role here is an important one and particularly important at the trust-building stage.

Other organisations will use external facilitators on a needs basis, feeling they can guide the process themselves. This too can be very useful, but care needs to be taken that the facilitator is sufficiently familiar with Irish partnership arrangements to be of value.

Finally, there are other companies who take the view that they need to solve their own problems from the outset, and do not employ external facilitation as a matter of principle.

In sourcing facilitators it is important that they have credibility with both management and unions, have the appropriate skills for the task in question, and agree with the organisation an exit path for them after a period of time.

5.9 Other Supports

As well as the supports already outlined, there is a range of other supports that organisations have found useful:

- The support of union officials at local or national level is obviously critical to the success of any initiative. The degree of involvement depends on the needs of the particular initiative
- The support of external employer representatives has also been used productively
- Advice from external support bodies such as the NCPP (National Centre for Partnership and Performance) has also proved useful in the context of providing case studies and general information on the area
- Involvement in projects with other organisations funded under initiatives such as ADAPT (Programme ended in 2000) and SKILLNETS (Programme ongoing until 2005) have offered the facility for shared learning. They also offer possibilities for long-term networking
- Certain support tools are also used to assess the climate of the organisation in relation to a range of areas such as trust, communications and other key areas. These diagnostics have been developed by IBEC and ICTU under the PACT initiative, funded under the ADAPT EU Initiative
- Aside from the use of external facilitators, organisations often find it useful to access consultancy or training resources on a needs basis. These are employed frequently to provide specialist training, or, for example, specialist advice in relation to an area that a task team is addressing.

5.10 The Relationship between Partnership and Industrial Relations

It is clear from the case studies that, just as there is no one model for partnership, the relationship between a partnership process and the IR machinery within an organisation is dependent on the particular situation of that organisation, and the relationships within it.

There are significant differences in how organisations handle IR and partnership. The partnership approach does not claim to replace IR arrangements. However, it is clear that partnership must impinge upon IR in some form. An adversarial IR system wholly separate from the partnership process is not a realistic option. There is a growing recognition that IR and partnership must be intertwined.

Anecdotal evidence suggests that this reality is now accepted by most. Nonetheless, the experience of companies suggests that the link or relationship is not easy to establish. The experiences of the cases suggest that companies have tried different options:

- Where organisations employ formal partnership processes, many ring-fence the IR process and regard the two as completely separate. This is often indicated in formal partnership agreements from the start. This can cause problems in integrating the two at a later stage, or can be seen to allow the partnership process to deal only with issues which many within the organisation might view as inconsequential in the greater scheme of things
- Some organisations ring-fence those IR issues that they are dealing with at that particular moment in time, but agree that all future issues will be dealt with within the context of the formal partnership process
- Where organisations operate informal partnership arrangements such as joint teams without formal structures, the process is regarded as separate and distinct
- In some organisations, no new structures are established, but a partnership approach is adapted to the pre-existing union/management fora.
- The existence of a partnership-type approach brings demonstrable benefits in relation to IR processes. For example, lower recorded instances of grievances, lower rates of absenteeism, reduced incidence of third party referrals and generally a more pragmatic and informed approach towards conducting IR issues are reported
- Improved levels of communication and understanding of the principal challenges facing the organisation
- Strict demarcation lines are not always followed, and a significant number of organisations have reported IR issues being dealt with within the partnership process
- One recent partnership agreement has actually made it explicit that all issues should be dealt with within the one forum.

In different circumstances, different approaches are taken to this issue, but it's important that mechanisms are considered which can integrate the partnership process and the IR machinery in the organisation.

However, in practice, partnership is less about structures than a mindset or an approach to change. Therefore, even where a dual system exists, the partnership ethos should permeate collective bargaining. This has been evidenced by the following:

5.11 Monitoring and Evaluating Partnership Initiatives

While significant effort is devoted at the outset to establishing a partnership approach in whatever form it takes, less formal emphasis tends to be placed on evaluating its impact and monitoring its progress.

However, it is an important aspect of partnership. In all of the cases the decision to extend partnership into new areas or to expand its role was based on assessment of the contribution of partnership. It is important that clear goals and methods of monitoring and evaluation are established as part of the partnership process.

The reason this area is so important is the following: Even the strongest partnership process has its champions and its cynics. A number of partnership processes have foundered when a key champion has moved on and is no longer involved. When benefits from a process have been identified, and quantified, then it can help the process with its own momentum independent of the personalities involved.

The criteria used to judge the progress of the partnership process depend on the aims and objectives established for the process at the start. If possible, qualitative and quantitative measures should be established at the outset, or if not at the outset, then as the process develops. The case study companies readily recognised that if starting the process again, they would regard this as a key to success.

Where the overall objective is to improve relationships between management and unions, then this can be difficult to measure, and this is often done informally by the feel-good factor on both sides. Even for this reasonably intangible area an attempt should be made to develop some criteria by which its effectiveness can be judged.

Where the objective is clearly an improvement based on performance, then quantitative measures need to be set out around that. Obviously it will be easier to do that for an organisation which is facing a crisis, and which needs demonstrable change quickly. However, for other organisations, when task teams are established, then quantitative targets should be set where possible, e.g. reduce scrappage by X%. This gives everyone on the team a sense of achievement when targets are met.

Monitoring and evaluation should be carried out by those involved in the process, and for those establishing task teams, a monitoring and evaluation team may be worth considering. In addition, the process should be formally reviewed at appropriate intervals depending on the particular initiative, e.g. every six months. The monitoring team at Tegral is an excellent example of this type of monitoring in action.

5.12 Key Success Factors

Each of the companies customised partnership to suit their unique situation; however, it is possible to highlight a number of issues which are key to success.

Usually, in any process, there will be a number of shared objectives with management giving greatest priority to securing or improving competitiveness and business performance. While employees and their union will concur, they will naturally tend to put more emphasis on issues that impinge on their working lives more directly, e.g. career progression, working environment and rewards. The challenge within partnership is to integrate the differing priorities, and devise means whereby mutual gains can be identified and measured.

A critical area in all cases is the need to have a clear business objective with mutual benefits for all stakeholders. Other critical areas are the support for partnership and the role and structure perceived for partnership in the company. Support must be present among all stakeholders, unions and senior management, and should be reflected in the level of resources given to partnership. Further, the experiences of the companies also highlight the importance of clearly understanding the role of partnership and its relationship with IR. Finally, the need to develop appropriate structures is a key factor in the effectiveness of partnership.

The boxed inset summaries the experiences of the companies.

Key Areas	Key success factors
Objectives and benefits	<ul style="list-style-type: none"> • Clear business objectives which highlight benefits for employers, employees and unions • Objectives address specific concerns in relation to future performance and profitability of the enterprise — for example, using partnership to reorganise work to become more productive while at the same time enhancing employees' input into decisions that affect them, and possibly providing some kind of assistance for future security of employment • Development of trust - an objective may relate to movement from a position of little trust to a position of medium to high trust between management and union, so that the relationship improves between the two, and union and management time is released for more productive issues • Early wins in relation to achieving joint objectives. Sometimes this involves addressing areas such as health and safety where there is a perceived gain on both sides • The process provides wins not just for those directly involved, but for employees and the company generally. A number of partnership processes provide excellent personal development opportunities for those directly involved, with little translation into mainstream benefits.
Support and commitment	<ul style="list-style-type: none"> • Explicit senior management support and demonstrated commitment in the organisation • Explicit union support at all levels • A champion on both sides, who can maintain the momentum of the process in difficult times • Sufficient resources are provided to ensure that, within the process, those charged with achieving certain tasks have the resources to do so.

Key Areas	Key success factors
Role and link with IR	<ul style="list-style-type: none"> • The IR process role and the partnership process role are clearly understood. In some cases this involves integrating the two almost completely, in others this involves initially separating them. Increasingly, it also means being flexible in allowing the relationship between the two to develop as the climate within the organisation develops
Structure and process	<ul style="list-style-type: none"> • Acceptance that a culture of change is at the heart of the process, and there is visible demonstration of how this benefits the organisation and the employee • The process is not seen as addressing only soft issues, but progresses to dealing with harder issues, e.g. work reorganisation. Evidence would suggest that where these are addressed, the development of real and lasting trust is accelerated • Recognition that partnership is a journey, and not an end point in and of itself • The partnership process does not overstretch itself and try to address particular contentious change issues without first addressing fundamental trust issues if these need to be addressed. • Structures adopted are consistent with the resource constraints and the climate of the enterprise • Clear communication to all involved in the process about the central issues involved, and people are given the tools to understand the information that they are receiving • Monitoring, comparative self-assessment, evaluation and feedback.

5.13 Key Barriers to Success

The experiences of companies also provide some useful indications of key barriers for the development of partnership.

Key Areas	Key barriers to success
Objectives and benefits	<ul style="list-style-type: none"> • There are no clear objectives in relation to the process itself and, in particular, the business objectives are unclear • The benefits to both sides are not tangible, e.g. the company ultimately does not benefit from a partnership relationship with the union, or employees do not benefit in the shape of increased job security, gain-sharing arrangements or some other identifiable benefit.
Support and commitment	<ul style="list-style-type: none"> • Shop stewards or middle management are either not committed, or, if committed, not carrying their members with them • There has not been a strong champion on at least one side (preferably on both) • The organisation has not applied the patience required to get through the difficult initial stages, and the initiative founders because of lack of concrete, informed support.
Role and link with IR	<ul style="list-style-type: none"> • Roles of individuals within the process are not adequately defined • The process is perceived as just another management initiative within the organisation, and the partnership team fails to convince employees that this is not the case, but that this represents a fundamentally different approach to doing business for both sides • Task teams undertake work, but their recommendations/actions are not followed up. This removes the credibility from the process, and can critically undermine it.
Structure and process	<ul style="list-style-type: none"> • Overemphasis on structure • Role of middle management/supervisory personnel ignored or misunderstood • Failure to integrate union personnel adequately into the process.

Partnership benefits – Specific examples from the Case Studies

5.14 Key Benefits from Partnership Initiatives

The final section in this chapter examines the benefits that companies and employees felt they had experienced because their organisation had adopted partnership practices.

The boxed inset summarises some of the benefits which arose within the case studies outlined in Chapter 4. It shows that employees and unions are involved in decision-making and this is underpinning organisational change, in different ways, and improving performance. This improvement is also felt in terms of quality of life and financial involvement.

In all of the companies, partnership has assisted in achieving significant organisational change. In the case of those that were in a crisis situation, it has assisted the company in actually surviving.

Benefits	Tegral	Dairygold	Aughinish Alumina	Jurys Doyle Hotel Group
Organisational Change	<ul style="list-style-type: none"> • Skill-based system • ERP 	<ul style="list-style-type: none"> • Autonomous teams • Contracting 	<ul style="list-style-type: none"> • Teams 	<ul style="list-style-type: none"> • Market responsiveness
Performance	<ul style="list-style-type: none"> • Stability • Costs 	<ul style="list-style-type: none"> • Enhanced adaptability and flexibility 	<ul style="list-style-type: none"> • Cost competitiveness • Process efficiency 	<ul style="list-style-type: none"> • Cost competitiveness
Decision-making	<ul style="list-style-type: none"> • Monitoring team 	<ul style="list-style-type: none"> • Employee involvement 	<ul style="list-style-type: none"> • Discussion on partnership 	<ul style="list-style-type: none"> • Workers as problem solvers
Quality of life	<ul style="list-style-type: none"> • Improved work structures • Flexible hours • Reduced conflict 	<ul style="list-style-type: none"> • Security of employment 	<ul style="list-style-type: none"> • Security of employment • Soft skills – training and development 	<ul style="list-style-type: none"> • Flexible work – job sharing
Financial Participation	<ul style="list-style-type: none"> • Gain-sharing 	<ul style="list-style-type: none"> • Gain-sharing 	<ul style="list-style-type: none"> • Under Review 	<ul style="list-style-type: none"> • SAYE

It is possible to draw a number of general conclusions about the benefits of partnership from these cases and other experiences.

1. Key business benefits to the organisation relating to their core business objectives. This can range from an enhanced ability to address organisational change, to increased performance in relation to KPIs. These benefits usually materialise after trust has been established.
2. Key benefits to employees including increased input into decisions which affect their everyday work, increased access to areas like training, and in some cases financial benefits from schemes such as profit-sharing, gain-sharing or SAYE.
3. A different approach to problem-solving within the organisation.
4. A redefined relationship between the organisation and the union based on trust, mutual respect, and the recognition that each has objectives to achieve and can assist each other in so doing.
5. A possible realignment of the employee relations function so that it is dealt with in a partnership-type manner, leading often to release of valuable time for personnel towards either core business or union issues.

6. Significant progress in the following areas, depending on the particular initiative:

- Competitiveness, adaptability, flexibility and innovation in the enterprise
 - Better systems of work organisation
 - Training and personal development which is linked to lifelong learning
 - Equality of opportunity and family-friendly arrangements
 - Problem-solving and conflict avoidance
 - Occupational safety, health and welfare issues, including physical environment improvements
 - Information and consultation
 - Time off, facilities and training for staff representatives; and
 - Forms of financial involvement.
7. In some cases the initiative, in a crisis situation, has assisted the organisation in actually surviving.
 8. Personal change for those involved in the partnership process. The importance of this cannot be underestimated. Most people will readily acknowledge that personal development has been a feature of their involvement. This personal development tends to open people towards the possibilities for further change.

Guidance for Partnership

This chapter summarises the key lessons from partnership initiatives at enterprise level and offers some guidance in relation to good practice in partnership initiatives.

The experiences can be summarised under the following five headings:

- Key considerations
- Mechanics underlying the process
- Supports and assistance for partnership
- Key Success Factors
- Partnership and industrial relations

6.1 Key Considerations

- The core issue facing organisations is to ensure the competitiveness and adaptability of the business, and to secure the employment of their employees. This can take many shapes or forms, but any partnership process must contribute to it.
- Engagement in the partnership process is voluntary for all sides. It is important to ensure that there are clear objectives associated with the process and that all parties understand what is driving this. The emphasis should be on increasing the competitiveness of the enterprise, and enhancing the role of employees in this process. Addressing core issues such as organisational change focuses partnership-type activity in a clearly measurable way.
- Partnership requires the commitment and support of employees, unions and senior management. Without serious commitment from all levels, and commitment in terms of resources, partnership will not deliver organisational change and improvement.

6.2 The Mechanics

- Assessing the company's position, across a range of indicators, is a useful starting point in generating options on what might be addressed. Matching this against the priorities of the company and union can form the basis for an effective action plan. Independent of this exercise, the organisation should assess and develop indicators of its current position so that it can measure progress at later stages, enabling it to clearly identify the benefits associated with the initiative.
- Assess at an early stage, on a joint basis, whether the services of an external facilitator are required, and the role expected of such a support. The role of the facilitator should be clearly defined, and in particular close attention should be paid to how that role develops as the process itself evolves.

- It is important to develop a structure that is suitable to the particular conditions of an enterprise. Broadly these structures can be either formal, with a steering committee and task teams, or informal, which involves no formal structure but focuses on adopting a partnership ethos and mainstreaming partnership approaches as part of the day-to-day business of the organisation. No one model is recommended, as there are a number of options available, and the approach must be tailored to the needs of the organisation.
 - If an organisation adopts the steering committee/ task team approach, it is vital to ensure that senior/middle/frontline management and union representatives are adequately represented on the steering committee. The role of the committee should be clearly defined, and at the earliest possible stage an attempt should be made to transfer ownership to task teams that address concrete issues. Steering committee meetings should be focused from the outset and the role of external union officials and employer representatives in the process should be clearly defined. The active involvement of project champions on all sides should also be encouraged.
 - If addressing some initial issues on a pilot basis, focus should be on a win-win scenario for all stakeholders. The process needs to demonstrate at an early stage its capacity to influence the competitive position of the company, and the welfare of its employees. Trying to tackle too many issues at the early stages, just as trust is developing, can be detrimental to the process.
 - It is important to ensure that effective communications strategies are employed throughout the process. Communications mechanisms that are suited to the needs of an organisation and its various stakeholders should be chosen. In communicating business information it is important to ensure that those receiving the information have the tools to understand what is being communicated. The focus should be on communicating the success of the initiative; otherwise the process will not develop the credibility critical to its long-term success.
- ### 6.3 Supports
- The importance of providing adequate training — including on a joint basis — throughout the process cannot be underestimated. It should be used as a mechanism both to impart information, and as an opportunity for group development. Training needs differ throughout the process, ranging from soft skills through to particular business skills. Particular attention should be paid to assessing the effectiveness of the training provided in assisting in the partnership process.
 - Comparative self-assessment techniques, such as benchmarking, provide a strategic tool that can be of assistance throughout a partnership process. Internal or external assessment, for example with other teams or at other companies, can significantly improve the focus of an initiative, and in particular, enhance the business focus.
 - The other supports needed throughout the process should be identified as they arise. The ongoing role of union officials and employer representatives should be clearly defined. The focus should be on providing adequate supports such as rooms for meetings and secretarial services. Appropriate trainers and consultants who may service the process should be identified, ensuring that they can work effectively within a joint initiative.

6.4 Success Factors/Benefits

- It is important to ensure that the objectives and the benefits of the process are clearly identified, communicated and reviewed by those involved. This can be achieved through constant monitoring and evaluation of the initiative itself. It is essential that, at the outset, the organisation has both an assessment of its current position in relation to the types of issues it hopes to address through the partnership process and a clear idea of the benefits it expects to receive from the process. This enables it to make an effective assessment as to whether the initiative is meeting its goals.
- It is critical that the partnership receives adequate support and commitment from all stakeholders — individual employees, union leaders, senior and middle management — and that it is sufficiently resourced.
- The key success factors and barriers outlined in Chapter 5 should be examined to ensure that each of these, where it is appropriate to the initiative, is addressed.

6.5 Relationship between Industrial Relations and Partnership

- The relationship between the collective bargaining mechanisms and the partnership process within an organisation is dependent on the particular circumstances of the enterprise, and can vary according to the stage of development of the process itself. It is inevitable however that within each organisation consideration will need to be given as to how the two can integrate as the partnership process develops. Given that partnership is primarily an approach to change rather than structures, some integration of the partnership and collective bargaining processes should arise.

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