

# **ORGANISATIONAL CHANGE POLICY**

Date to be  
reviewed  
September 2023

## VERSION CONTROL

<b>Version</b>	<b>Date</b>	<b>Author</b>	<b>Status</b>	<b>Change</b>	<b>Review date</b>
1.0	September 2022	Annette Greaves	Live	Signed off by JNC 15 September 2022	September2023

## **CONTENTS**

1. Policy Statement .....	5
2. Principles.....	5
3. Responsibilities .....	7
<b>APPENDICIES</b> .....	8
Appendix 1 – Template for Scoping Document .....	11
Appendix 2 - Redundancy Policy	
Appendix 3 - Communications Plan (TBC)	
Appendix 4 - Partnership Agreement	
Appendix 5 - Flow Chart .....	14
Appendix 6 - Checklist .....	15

## **Organisational Change Policy**

### **1. Policy Statement**

This policy applies to all employees of Manx Care (permanent and temporary) and Public Services Commission (PSC) employees whose stationed employer is Manx Care.

In representing the interests of their members, trade unions and professional bodies have an important role to play in any significant change programme.

- 1.1 Manx Care regards its employees as its most valuable asset; and it is Manx Care's aim to provide a safe, stable and satisfying working environment for all colleagues.
- 1.2 Manx Care must, be flexible and able to change in response to a variety of circumstances. Change is achieved when all colleagues are informed and when as many colleagues as possible take part in designing and implementing it.
- 1.3 When a need for organisational change has been identified, the principles in this policy will be followed.

### **2. Principles**

- 2.1 For the purposes of this policy, organisational change means any significant structural or managerial change in the organisation of Manx Care functions which may affect colleagues':
  - working arrangements
  - skills
  - workloads
  - provision of new services
  - expansion/reduction of services
  - staffing levels.
- 2.2 This policy seeks to mitigate the effect on colleagues of organisational change, and to provide a fair and equitable process for proposing and implementing change.
- 2.3 Due consideration should be given to ensuring equality when considering any organisational change e.g. change of location may result in different availability of public transport which may have the potential to impact a particular group.
- 2.4 At the outset of the change process, a scoping document should be drawn up by managers of the service for approval by relevant authority (e.g. Manx Care Board,

ELT, Senior Management) to identify the need for and extent of the anticipated change<sup>1</sup>.

This should include: an overview of how services will be provided or roles will be changed under the:

- revised arrangements
- the reasons for making the change
- the extent of the change, including the number of colleagues likely to be affected
- the process/project plan for managing the change and approximate timescales
- undertaking an organisation change risk assessment, an equality assessment and, where there may be an impact on health and safety, a health and safety risk assessment for example, considering lone working, training etc.
- a communications plan where significant numbers of staff are affected
- proposed changes to role descriptions, duties or locations
- changes to duties which are already within the overall scope of the role description or person specification
- the creation of new posts
- proposed changes to line management arrangements (where this will result in a long term change rather than temporary periods of cover e.g. due to long term sickness/maternity cover).
- reasonable timescales dependent on scope and scale of the project.

2.5 The scoping document will provide the basis for the initial discussions with trade unions and professional bodies, and it is recognised that initial plans may need to be amended to take account of the outcome of such discussions.

2.6 Manx Care will consult directly and at the earliest opportunity with colleagues who are affected, both to provide information about the need for change and to gain understanding from those colleagues of issues which may be associated with the change.

2.7 Manx Care accepts its responsibility to minimise impact of the change both to colleagues and services in the implementation of change.

2.8 Manx Care will seek to minimise job losses when implementing organisation change. Effective change plans should include future staffing needs (including succession planning) as part of ensuring the provisions of good quality, efficient and cost-effective services. Where job losses are inevitable (through the mutually agreed resignation scheme, voluntary redundancy<sup>2</sup> or compulsory redundancy), Manx Care will manage such change in the most fair, consistent and considered manner. The Office of Human Resources Staff Welfare Service has staff who can provide emotional support, counselling and signposting. Manx Care should ensure colleagues are aware of and can take the opportunity to obtain support from the Service.

---

1 Scoping template

2 Redundancy Policy

2.9 When implementing organisational change, Manx care will act to relevant employment legislation and all relevant departmental or governmental policies and agreements (see appendices).

### 3. Responsibilities

3.1 **Chief Executive** – As Accounting Officer of Manx Care, the Chief Executive has delegated Authority to require the employees of the organisation “to perform such duties and observe and comply with such reasonable instruction as may from time to time be stipulated”, including those necessary to meet statutory requirements.

3.2 **Managers** – It is the responsibility of directors and managers to ensure that they understand and comply with this policy. Support on the implementation of this policy can be sought from Office of Human Resources or the Trade Unions. Learning, Education and Development offer courses for managers to facilitate change.

3.3 In the case of colleagues absent through maternity leave, sickness, secondment or suspension, line managers are responsible for setting up a communications plan<sup>3</sup>, ensuring that such colleagues are:

- kept informed fully when a change programme commences
- consulted appropriately
- in relevant circumstance, have the same opportunities for consideration of alternative employment and other options as any other colleague affected.

3.4 **Employees** – All colleagues are required to comply with this policy.

3.5 **Trade Unions and professional body representatives** – It is accepted by Manx Care and the trade unions and professional body representatives of its employees that collaborative industrial relations foster good morale and operational effectiveness. To this end the ‘employer side’ and ‘staff side’ commit to working in partnership so that organisational change is implemented collaboratively.

3.6 In line with the Partnership Agreement<sup>4</sup>, the trade unions and professional body representative’s act at all times with the best Interests of their members in mind, and accept that organisational change is sometimes necessary.

3 Communications Plan

4 Partnership Agreement

## **APPENDICIES**

Appendix 1 – Project Plan Scope Template

Appendix 2 – Redundancy Policy

Appendix 3 – Communication Plan (TBC)

Appendix 4 – Partnership Agreement

Appendix 5 – Flow Chart

Appendix 6 - Checklist

## Appendix 1

### ORGANISATIONAL CHANGE - PROJECT PLAN SCOPE TEMPLATE

Project No. or Name	Date Submitted
	MM/DD/YYYY
Project Objectives	
<ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>	

#### Step 1. Project Deliverables

Deliverable No.	Description
1	List all project deliverables and briefly describe each. Do not list dates
2	Deliverables should include outputs and ancillary results: PM reports, documentation, etc.
3	The level of detail will be dependent upon the project objectives

#### Step 2. List of Project Tasks

List all project tasks to be completed, based on the deliverables listed in the previous section. Do not list dates. Add more rows as necessary.

*Alternatively, you can attach your work breakdown structure (WBS) to the scope statement.*

<b>Work breakdown structure (WBS) attached</b>	NO	X	YES	
<b>Provide link, if applicable</b>	N/A			

Task No.	Description	For Deliverable No. Enter Task#
1	Planning	
2	Execution	1
3	Evaluation	1, 2



### Step 3. Out of Scope

<b>This project will not accomplish or include the following:</b>	List deliverables or tasks that you will not complete or provide as outputs of this project
---	---

### Step 4. Project Assumptions

No.	Assumption
1	List any project factors that you consider to be true, real or certain
2	Assumptions generally involve a certain degree of risk
3	Describe the potential impact of assumptions should they prove to be false

### Step 5. Project Constraints

<b>Project Start Date</b>	MM/DD/YYYY
<b>Launch/Go-Live Date</b>	MM/DD/YYYY
<b>Project End Date</b>	MM/DD/YYYY
<b>List Any Hard Deadlines</b>	
<b>List Other Dates/Descriptions of Key Milestones</b>	
<b>Budget Constraints</b>	Enter information about project budget limitations (total project budget, maximum budget for key project deliverables)
<b>Quality Performance Constraints</b> or	Enter any other requirements for the functionality, performance, or quality of the project
<b>Equipment/Personnel Constraints</b>	Enter any constraints regarding equipment or people that will impact the project
<b>Regulatory Constraints</b>	Enter any legal, policy, or other regulatory constraints

--	--

**Step 6. Updated Estimates**

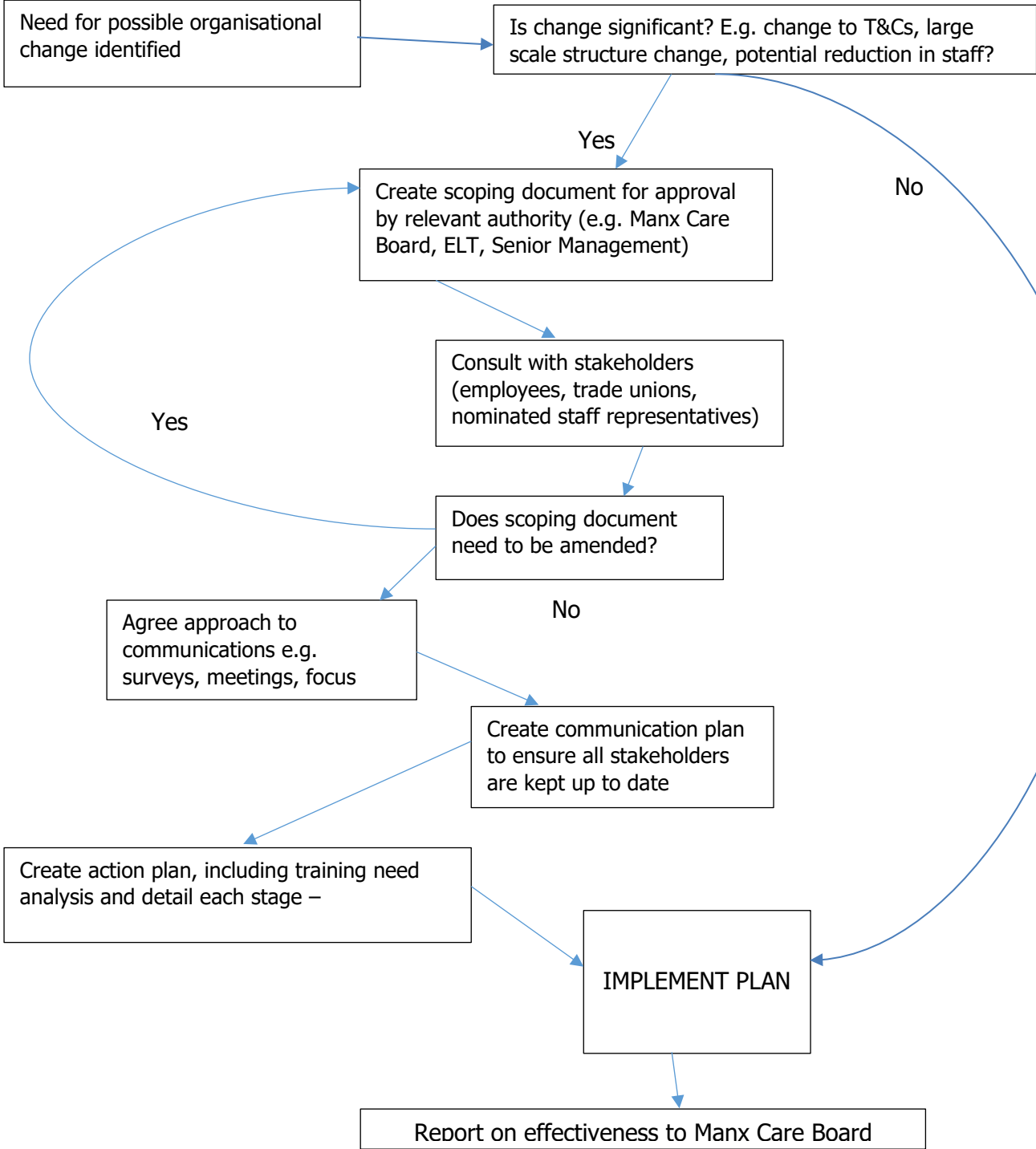
<b>Estimate the hours required to complete the project</b>	Enter total hours
--	-------------------

**Step 7. Approvals**

Stakeholder Name and Title	Role of Stakeholder/Approver	Date Submitted for Approval	Date Approval Received

**Appendix 5**

**Organisational Change – Flow Chart**



## Appendix 6

### CHECKLIST – Organisational change risk assessment

Step	Process	Comments
1	Identify the risks: <ul style="list-style-type: none"> <li>Decide who might be affected</li> <li>Evaluate the risks and mitigations for these</li> <li>Record findings and minute all meetings</li> <li>Monitor and review</li> </ul>	
2	Have all other avenues been explored? Why is change necessary? Why is it not feasible to maintain the status quo? Undertake evaluation process e.g. <b>SWOT</b> analysis	
3	Is there a commitment from all parties to the consultation process <ul style="list-style-type: none"> <li>Management</li> <li>Employees and their representatives</li> <li>Trade Unions</li> <li>Nominated staff representatives</li> </ul>	
4	Set up arrangements (surveys, meetings, focus groups) to identify and address the risk factors such as: <ul style="list-style-type: none"> <li>Time and resource demands on staff to do the work</li> <li>Who is responsible</li> <li>Is the staff mix (skills/experience) sufficient</li> <li>Refer to Health and Safety Executive's Management Standards<sup>1</sup> for advice on relevant risk factors (demands/control/support/relationships/role conflicts/change)</li> </ul>	
5	Create communication plan to ensure all parties are kept informed	
6	Identify the gaps between the current situation and good practice against relevant risk factors	
7	Set up and cater for the training needs of staff taking on new roles/responsibilities in the new structure	
8	Document each stage of the planning and implementation of processes (is each stage <b>SMART?</b> )	
9	Relevant authority to review the effectiveness of decisions with stakeholders within a couple of months of implementation.	
10	Relevant authority to audit the changes against key service/professional performance indicators within 6 or 12 months post-implementation	