
Questioning and influencing to improve workplace conditions

Practical guide for RCN representatives
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About this booklet

This practical guide has been designed by RCN representatives and officers to help you to question and influence on behalf of members in your workplace.

Representatives and officers in three England regions (North West, West Midlands and Yorkshire & the Humber) have developed and tested a framework of questions and prompts to help guide you in this area of your practice.

This guide introduces you to the framework and provides you with reminders of the key points to think about when identifying and acting on early signs of workplace issues. It can be used in your preparation for meetings – either in your workplace or with your RCN officer – or during meetings to help you to quickly check that you have covered the main points you want to address.

This guide can be used by all RCN representatives – learning reps, safety reps or stewards. More detailed information, including links to relevant resources and guidance, is available in the representatives’ hub section of www.rcn.org.uk
Questioning and influencing has been defined as the activity you do accessing and analysing information to identify workplace issues early that might impact on members and their practice and support proactive interventions on their behalf. It is about picking up issues before they become major problems and working together with other trade union colleagues and your employer to address issues promptly and positively. In addition, this activity may lead to the identification of areas of excellence that can then be shared more widely across the workplace.
When planning your questioning and influencing, with the support of your RCN officer, think about the five key areas of:

- organisational change
- health and safety
- staff investment
- engagement
- culture.

Within each of these areas there are some key information sources that you will have access to, or can request, in your role as an RCN representative.
When you are using this booklet there are some general points you may want to consider.

**General sources of information**

- For those working in the NHS, the NHS *Staff Survey* provides a key measure of job satisfaction among NHS staff. Are you aware of, or do you have access to the NHS *Staff Survey* or your own workforce survey results for your place of employment?

- You may also want to have a look at your organisation’s risk register and most recent organisational development report to the board, if available.

- Have members raised any related issues with you about the area you are looking into? Could you get some additional feedback from members to strengthen your question?

**Asking questions**

- You might want to concentrate on one of the questioning and influencing themes at a time – think about whether there is one in particular that you need to concentrate on at the moment.

- Do you need to involve anyone else in your workplace, for example, the Director of Nursing, other RCN reps, other union reps.
• Think about how you ask key questions. It might be you who asks a question or it might be better to influence someone else to ask it, for example, the staff side chair.

• Think about where it is best to ask key questions (or arrange for them to be asked), for example, JNCC/Partnership Forum, H&S Committee, board meetings, request one-to-ones with key people.

• How will you share the intelligence or data you get hold of within your workplace and with your regional/country office? How will you record any agreed joint actions?

It is important to remember that issues of equality, diversity and human rights apply across all of the questioning and influencing themes. You should always be mindful of whether or not certain groups of members are being unfairly impacted upon by any aspects of your workplace because of their specific characteristics, for example, age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation, political opinion.
Organisational change
Consultations and commissioning

Types of issues

- Formal consultations around organisational/service restructure or transfer of staff to a different employer (TUPE)
- Proposed policy changes affecting terms and conditions of employment
- Call for external bids to provide services currently delivered by your employer
- Development of a new service or decommissioning of an existing service
Ask for:

- formal notification of the proposed changes
- relevant consultation/policy documentation/service specifications and proposed timelines
- the equality impact assessment for the proposed reorganisation or policy
- pre- and post-transfer processes and procedures, job descriptions and employment rights (including pensions).

Think about:

- how might these proposals affect patient/client experience?
- are any staff/RCN members adversely affected in terms of their employment/terms and conditions/health and safety?
- are any RCN members facing redundancy, downbanding/downgrading, skill mix review or redeployment?
- are formal processes and timescales being adhered to by management/HR? Is there any aspect of the process that you need to challenge?
- what are members across the organisation saying to you about these proposals?
Health and safety
Accidents and incidents

Types of issues

- Never event/serious incident
- Slips, trips and falls
- Hospital acquired Infection/pressure ulcers
- Near misses
- Drug errors
- Manual handling
- Assaults
- Needlestick incidents
- Lone working
- Equipment
Ask for*:  
- information on recorded incidents, accidents and risk assessments in the above categories  
- information on the proportion of recorded incidents that have involved nursing staff  
- workplace inspection and audit reports  
- information on any resulting investigations or disciplinary action involving nursing staff.

Think about:  
- are there any concerning patterns around:  
  - patient and/or nursing staff safety being potentially compromised  
  - health and safety (H&S) /clinical risk monitoring procedures not being followed  
  - nursing staff being investigated/disciplined following patient incidents/accidents.  
- are there any patterns/hotspots, for example particular service areas?  
- what are members across the organisation saying to you about accidents and incidents?  

*Safety reps have a legal entitlement to workplace data around health and safety under the SRSC Regs 1977/Brown Book
Health and safety

Staff wellbeing

Types of issues

- Stress
- Bullying and harassment
- Sickness/absence/presenteeism
- Staffing levels/vacancies
Ask for:

- information on current sickness absence/presenteeism rates
- information on reported work-related stress and bullying and harassment
- current vacancy rates for nursing staff posts
- exit interview data and any reported trends
- occupational health/employee assistance programme health data for nursing staff – themes and trends.

Think about:

- are there any concerning patterns around:
  - wellbeing of nursing staff being compromised
  - patient and/or nursing staff safety being potentially compromised
  - H&S/clinical risk monitoring procedures not being followed.
- are there any patterns/hotspots, for example, in particular service areas?
- what are members across the organisation saying to you about staff wellbeing?
Staff investment

Staff development

Types of development

- Appraisals
- Access to clinical training and development
- Mandatory training
Ask for:

- information on appraisal completion rates
- information on training and development spending
- information on progression through increments/pay gateways and reasons for non-progression
- information on mandatory training completion rates and course cancellations
- information on nursing staff being supported to access clinical training and development.

Think about:

- how do nursing staff compare with other clinical colleagues in terms of their access to appraisal, personal development, mandatory training, access to clinical training and development, proportion of training budget spend?
- are there any groups of nursing staff who are being unfairly treated in terms of their access to development, for example, part-time staff?
- are some nursing staff failing to progress through increment/pay gateways as a result of lack of access to development opportunities?
- is lack of nursing staff development impacting negatively on patient/client safety and/or experience?
- what are members across the organisation saying to you about staff development?
Staff investment

Staff support

Types of support

- Induction
- Preceptorship
- Supervision/mentorship
- Continuing professional development
- Basic skills
Ask for:

- a copy of their induction framework
- a copy of their supervision/preceptorship framework
- information on what proportion of nursing staff have a named supervisor/mentor
- information on what support is available to staff around revalidation requirements
- information on nursing staff being supported to access continuing professional development.

Think about:

- what proportion of nursing staff have had a formal induction?
- does current supervision/preceptorship practice meet framework requirements?
- are some nursing staff reporting that they have been pressured into undertaking tasks/duties where they have stated they do not feel qualified/competent?
- what is your employer doing to support nursing staff with their revalidation?
- are some groups of nursing staff being unfairly treated in terms of access to professional support, for example, night/part-time staff?
- is there a knock-on negative impact on patient/client safety and/or experience?
- what are members across the organisation saying to you about staff support?
Engagement

Effective joint working: meetings and partnership fora

Types of issues

- Senior management commitment
- Regularity of meetings and attendance
- Ways of working and behaviours
- Sharing of appropriate information in a timely manner
- Engagement with key issues affecting staff
- Commitment to an agreed set of principles to promote effective joint working
Ask for:

- terms of reference for the partnership forum you are attending
- advance notice of meeting dates for the year
- minutes of meetings
- a list of the agreed set of data/reports that is shared at the meeting
- a list of group members and who they represent at the meeting
- agreed processes for sharing information from the committee/forum with staff and union members.

Think about:

- what is the level of senior management commitment to the committee/forum?
- are meetings regularly scheduled and with enough advance notice?
- is the RCN represented? If not, why not?
- are you receiving the agreed set of data and reports for the meeting, or are there reports missing?
- is there a joint approach to tackling identified issues with management and other recognised unions?
- is the business of the meeting conducted openly and transparently?
- do all parties demonstrate mutual respect for one another’s roles and a commitment to fair process?
Engagement

Effective joint working: stakeholder engagement

Types of issues

• Management commitment to early engagement and communication

• Ways of working and behaviours

• Sharing of appropriate information in a timely manner

• Adherence to timescales and agreed processes

• Commitment to an agreed set of principles to promote effective joint working
Ask for:

- copies of key policies and procedures around formal processes, for example, grievance, disciplinary, bullying/harassment
- data on trends to do with formal processes, for example, grievance, disciplinary, bullying/harassment, patient complaints
- data on feedback from patients and their families.

Think about:

- is senior management/HR committed to early engagement and communication with staff on emerging issues?
- does management/HR work with you to minimise resorting to formal processes involving members?
- is there a shared commitment to learning from patient feedback?
- is there a joint commitment to agreed timescales and procedures when you are representing members through formal processes?
- does management/HR share data around trends for example, grievance, disciplinary, bullying/harassment?
- do all parties demonstrate mutual respect for one another’s roles and a commitment to fair process?
- do you have good relationships with reps from the other recognised trade unions?
- what are members across the organisation saying to you about stakeholder engagement?
Culture

Workplace trends

Types of issues

- Access to potential and existing members
- Casework patterns and informal feedback
- Members raising concerns/whistleblowing
- Complaints/patient feedback
- Media reports
- HR data, for example, staff survey, bank/agency use, staffing levels, bullying and harassment
- RCN visibility and reputation
Ask for:

- a copy of the facilities agreement
- a session on the corporate induction programme to talk to new staff about the RCN
- complaints data
- HR data around bank/agency use and staffing levels
- data on trends to do with stress levels, bullying/harassment, exit interview themes
- a copy of the (NHS) staff survey results for your organisation.

Think about:

- is the facilities agreement up-to-date and adhered to?
- is the RCN visible and approachable to members?
- is there anything in your casework patterns and contact with members that suggests a poor workplace culture that could impact on patients and/or staff?
- are there worrying trends or hotspots around, for example, complaints, stress levels, bullying or harrassment?
- are any of these issues impacting negatively on patients and/or staff?
- do all parties demonstrate mutual respect for one another’s roles and a commitment to fair process?
Type of performance measures

- Financial targets
- Clinical outcome measures
- Staff metrics, for example, turnover, workforce spend
- Staff surveys
Ask for:

- information on the current overall financial position, for example, underspend, overspend, budgetary pressures, uplift/backfill
- information on specific clinical performance issues/targets being addressed
- information on staffing trends causing concern for example nursing staff turnover, bank/agency spend, skill mix, overseas recruitment, sickness absence, vacancies on hold for financial reasons
- (NHS) Staff survey outcomes for your place of employment and any plans being developed to address identified issues.

Think about:

- are there any concerning patterns around:
  - finance
  - clinical outcomes
  - staffing.
- is the RCN currently involved in supporting improvement activity?
- are there any patterns/hotspots, for example, particular service areas?
- what are members across the organisation saying to you about organisational performance?