A Tool for Partnering:

The Partnership Matrix

In creating a partnership between labor and management or agreeing to work together on a particular problem, one of the challenges for both parties is to clarify expectations. We have developed a tool which reduces the confusion that often arises because parties have differing expectations of what a "partnership" or "joint activity" means and the responsibilities that go with it. This tool—the partnership matrix—should be used before joint activities are undertaken. It defines on a practical level the areas over which labor and management agree to collaborate. It also defines, for each area, the decision-making level that management is willing to share with labor.

Instructions

Instructions for using the partnership matrix are as follows.

1. Define the areas that both parties might consider being part of the partnership. The areas for joint activity or partnership vary with the enterprise. They may include the following:

   - Problem-selection and problem-solving process
   - Design and implementation of work systems / case management system
   - Training of employees
   - Quality management
   - Improving patient satisfaction
   - Improving quality-of-care indicators
   - Clinical pathways
   - Material control
   - Capital equipment purchases
   - Hiring of employees
   - Unit communication and information-sharing

2. Once the potential areas have been defined, walk through each area, one at a time, and decide:

   a) First, will this be part of the partnership? In other words, is it currently within the control of this site and is management willing to have the union involved in this area at this point in time?

   b) Second, if it is part of the partnership, what level of decision-making does the union seek and is management willing to share? The partnership matrix defines five levels of decision-making:

   1. Informed
   2. Consulted
   3. Developers
   4. Input in Decision-Making
   5. Full partners in decisions

3. Fill out the matrix, entering the area, a check if the area will be part of the partnership, and a check in the column indicating the level of decision-making to which both parties have agreed.

A Living Document

In some situations, the areas of partnership or joint decision-making are quite clear initially, but become broader and fuzzier with time. In other cases, management becomes more comfortable with sharing greater decision-making power as all parties gain skills and experience. As a result, the partnership matrix should be treated as a living, working document and revisited from time to time.
Levels of Involvement Between Union and Management Partners

1. Communication

Opportunity to influence through giving feedback on what is already designed.

2. Developers

Participate in developing solutions, changes, and proposals.

3. Input in Decision-Making

Opportunity to influence final decisions: participate in monitoring and taking corrective action.

4. Full Partners in Decisions

Full partners in reaching final decisions, formulating plans, monitoring, and taking corrective action.
<table>
<thead>
<tr>
<th>Activity</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</thead>
<tbody>
<tr>
<td>Union Management Partnership Matrix</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes/No</td>
<td>Informed</td>
<td>Consulted</td>
<td>Developed</td>
<td>Partners in D-M</td>
<td></td>
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</tbody>
</table>
# EXAMPLE

## Union-Management Partnership

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
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<td>Yes</td>
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<tr>
<td>Reducing supply and material costs</td>
<td>Yes</td>
<td></td>
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<td></td>
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<tr>
<td>Payer interface</td>
<td>No</td>
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<tr>
<td>Developing strategic plan</td>
<td>Yes</td>
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<td></td>
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<td></td>
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</tr>
<tr>
<td>Redesign of clinical paths to reduce LOS</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

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DEVELOPING STRATEGIC ALLIANCE ACTIVITIES

Separate and Mutual Interests Begin to be Defined.

Full Partners

1. Traditional Labor-Management Domain
   - Examples: Health & Safety Committees
   - Examples: Wages, Work rules

2. Joint Problem-Solving to Improve Working Conditions
   - Examples: Greater worker access to supplies

3. Projects Focused on Operations Improvements
   - Examples: Equipment layout, Statistical process control, Worker skill training

4. Systems Changes
   - Examples: Work and process design, Information systems for shopfloor, Compensation

5. Business Strategy
   - Examples: Five-year planning, Product development

Initial Labor-Management Activities

Increased Levels of Strategic Alliances

9/6/2000 U/Plazes/WPdocs/Handouts/Developing SA Activities