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Cwm Taf Morgannwg University Health Board

Social Partnership Duty Annual Report

April 2024 – March 2025



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Foreword

I am pleased to present Cwm Taf Morgannwg University Health Board's (CTMUHB) Social Partnership Duty Annual Report for the year 2024-2025.

This report outlines the commitment and actions taken by CTMUHB to comply with the Social Partnership Duty, under the Social Partnership and Public Procurement (Wales) Act 2023. The duty requires public bodies to engage meaningfully with workforce representatives and other stakeholders to promote fair work, improve wellbeing, and deliver better public services. The duty also requires organisations to publish an Annual Report for submission to the Social Partnership Council.

This report has been prepared in collaboration with our trade union (TU) colleagues across both Agenda for Change (AfC) and Medical and Dental (M&D) staff groups and presents a summary of work undertaken to progress our commitment to working in collaboration with our workforce, trade unions, and external partners to ensure inclusive decision-making and continuous improvement in health services to the 450,000 people living in our three County Boroughs: Bridgend, Merthyr Tydfil and Rhondda Cynon Taf.

At CTMUHB, we recognise the Act as an essential tool for promoting fairness, collaboration and transparency in public sector decision-making and remain dedicated to upholding and actively implementing the principles of consensus, compromise, and co-production.

I would like to acknowledge all of our staff at Cwm Taf Morgannwg University Health Board for progressing this agenda and extend a special thank you to our Trade Union (TU) partners for both their contribution to this report, and their continued support.

Whilst I am proud to share the progress we have made, I acknowledge we have more work to do to genuinely and proactively embed social partnership in every element of service provision. In coming years, I look forward to demonstrating the measurable difference that this commitment is making to patients, families, communities, and our colleagues, reporting on both actions and impact.

Hywel Daniel - Executive Director for People

Our Approach

CTMUHB is committed to fostering collaboration with our workforce, trade unions, and external partners to ensure inclusive decision-making and continuous improvement in health services to the 450,000 people living in our three County Boroughs: Bridgend, Merthyr Tydfil and Rhondda Cynon Taf.

We recognise the Social Partnership and Public Procurement (Wales) Act 2023 as a vital mechanism for embedding fairness, collaboration and transparency in public sector decision-making, and remain committed to ensuring that the principles of consensus, compromise, and co-production are not only upheld, but meaningfully enacted in CTMUHB everyday.

In preparation for the Social Partnership Duty legislation, which came into effect on 1st April 2024, we worked with our trade union colleagues to better understand the legislation and how we could implement this to best effect. During our planned meetings, for example our Local Partnership Forums (LPF), Joint Local Negotiating Committees (JLNC) and regular meetings with our trade union leads, we continue to consider how we can embed the duty into key issues and concerns that arise and reference the Act in terms of how we should work jointly on the solutions.



Governance

CTMUHB governance and oversight are fundamental to ensuring that the principles of social partnership are embedded at all levels of the organisation.

Social Partnership Structures

We have integrated social partnership considerations into board-level decision-making, to ensure we embed accountability and transparency at every opportunity. Examples of our social partnership structures include:

- A well-established local and CTM wide Local Partnership Forum (LPF) structure for AfC, and Joint Local Negotiation Committee (JLNC) for M&D to engage with our trade union colleagues;
- Co-development of our People Plan 2025- 2030, which was created in response to direct feedback from staff and trade union colleagues. This collaborative effort is a core example of meaningful partnership working. It

reflects the Health Board's willingness to listen, engage, and act in response to staff voice - facilitated through our trade unions' advocacy;

- TU representation on various Working Groups e.g. Lateral Moves Scheme, shift pattern consultation, job matching, safe sleeping facilities;
- Regular collaborative engagement with local and national workforce advisory groups.

Leadership Commitment

The Chief Executive and CTMUHB Board members actively champion social partnership principles. There is a designated Social Partnership Lead at Executive level to ensure compliance with the duty and oversee partnership engagement and we have an independent Board member drawn from our trade union representatives.

Frequency of Engagement

We continue to build on the good work undertaken over the last couple of years with our trade union colleagues and have separated out strategic and operational discussions into distinct pathways which enable issues to be considered and resolved in a more streamlined manner and at the appropriate level.

We have a regular strategic meeting between the Chair of Staff Side, Chief Executive and Executive Director for People, in addition to monthly meetings between trade union leads and our Deputy Director of People, to discuss a range of topical issues. This framework supports the timely raising and resolution of issues and helps manage the flow into our quarterly LPF and JLNC meetings. In addition to this, we manage ad hoc dialogue on urgent matters as flexibly as possible, as and when required, to ensure a speedy resolution to issues.

Agenda setting is agreed in advance, in partnership with trade union colleagues, and we rotate the Chair for LPF and JLNC between management side and trade union side. Trade union leads jointly agree the highlight reports to the CTM LPF and JLNC.

Wellbeing of Future Generations Act - Wellbeing Objectives

CTMUHB's wellbeing objectives are fully aligned and integrated with the CTM2030: Our Health, Our Future strategy and our ambition to being a population health organisation. This strategy was developed in partnership.

In April 2025, the CTMUHB Board approved our wellbeing objectives following our annual review as follows:

- Work with communities and partners to reduce inequality;
- Promote wellbeing and prevent ill-health;
- Provide high quality, evidence based, and accessible care;
- Ensure sustainability in all that we do, economically, environmentally and socially;
- Co-create with staff and partners a learning and growing culture
- Embed the Welsh language in all we do, recognising the importance of Welsh in people’s care and our contribution as an anchor organisation to the wider aim in Wales of reaching a million Welsh speakers

Our objectives align with the wellbeing goals of the Wellbeing of Future Generations Act (WBFGA) and are also aligned to the wellbeing objectives of Cwm Taf Morgannwg Public Services Board (CTMPSB), with whom we continue to work with closely. The CTMPSB wellbeing objectives largely focus on building healthier, sustainable and resilient neighbourhoods with a desire to deliver a more equal CTM, reducing inequalities that exist.

The overall vision of CTMUHB is “Building Healthier Communities Together.” This includes working together internally within the health board, and externally with our population, communities and partner organisations. The Creating Health programme within CTM helps to focus efforts on what we can do to contribute to developing, supporting, and working with our communities to build capacity to encourage wellbeing and prevention. A delivery plan to support the work of the Creating Health Programme was also approved by CTMUHB Board this year.

Given that CTMUHB employs around 13,000 staff and, of these, approximately 80% live within the boundaries of the health board, our role in building healthier communities is significant and this underpins much of our work as an anchor institution. This includes providing employment with fair pay in line with AfC pay scales and in parity with other NHS organisations, and aims to offer staff equitable opportunities for progression, and a people focussed approach with staff wellbeing initiatives, including mental health support and flexible working options. Regular engagement with trade union leads allows for discussion on these issues as needed.

We continue to identify partnership opportunities with local groups, organisations and charities for supporting people’s health and wellbeing needs. One example of this has been the CTM Neurodevelopment Improvement Programme, which is a collaborative, multi-agency mechanism aimed at driving continuous improvement for all services across the region to enable neurodivergent people of all ages to lead fulfilling lives. This is in line with the goals of the CTMPSB workforce wellbeing subgroup, which this year has established a task and finish group reporting to the PSB focusing specifically on neurodiversity.

Service Co-Production with Staff and Partners

CTMUHB has developed and implemented a number of programmes and initiatives as part of service co-production. These include:

- Embedding our ‘Simply Do’ initiative, which is a virtual space for our workforce to share ideas for improvement, engage and collaborate with the improvement ideas of others, and stay updated with the life-cycle of an idea or suggestion.
- Working collaboratively on regional programmes, including the development of the new Llantrisant Health Park, envisioned as an innovative diagnostic and treatment centre, co-designed with regional partners to meet the evolving needs of our CTMUHB catchment population.
- Co-development of CTMUHB’s People Plan for 2025- 2030, which reflects the lived experiences of our staff and was created in response to feedback from our Staff Survey 2024, in addition to direct feedback from engagement sessions with frontline staff and trade union colleagues. Trade union colleagues have played an active and constructive role in shaping our People Plan, including:
 - Reviewing draft proposals and providing feedback aligned with member concerns
 - Championing inclusive language and measurable commitments
 - Ensuring that the People Plan aligns with the principles of the Social Partnership duty and wider wellbeing objectives
 - Championing the People Plan at launch events and briefing sessions, alongside Executive colleagues
- Co-development and refinement of our organisational wellbeing objectives, reaching consensus on several key priorities - particularly those relating to staff mental health, retention, and safe staffing levels. These areas align with our broader advocacy for a healthier, more sustainable workforce.
- Trade union representatives were engaged in strategic discussions regarding steps to deliver these objectives, including shift pattern reviews and policy alignment with Health Board guidance. Input was evidence-based and rooted in member feedback, with outcomes documented in joint meeting minutes and follow-up communications.
- Our trade union representatives continue to be integral to our approach to policy review and form part of the core membership of the People Policy Review Group (PPRG). We have recently agreed a new policy workbook, with a focus on delivering simplified, user-friendly policies, based on principles and

high trust. Trade union members are also actively involved in Task and Finish groups reviewing and developing new and existing policies.

- Agreed practical adjustments to uniform requirements during hot weather. This was based on trade union proposals, grounded in staff feedback, health and safety considerations, and a commitment to maintaining professional standards while safeguarding wellbeing. The Health Board responded promptly and constructively, demonstrating a proactive and engaged approach to partnership working. The outcome not only improved staff comfort and morale during the heatwave but also reinforced trust in the mechanisms of joint working.
- The JLNC reached a successful resolution, working in partnership with the Health Board on a longstanding dispute regarding rest breaks and the use of patchwork.

Promoting Equality, Diversity, and Inclusion (EDI)

Listening, learning, and improving; treating everyone with respect; and working together as one team are our core values. We work to reflect them in how and when we involve groups and communities within and outside of the organisation to inform direction, priorities, and actions.

CTMUHB has continued to progress its Strategic Equality Plan (SEP), launched in early 2024 following robust engagement with our people, patients, partners and our communities. We established an EDI Working Group to ensure we learn with and from each other, and appropriately support, challenge, and scrutinise delivery of the SEP. This group was among the first to facilitate a specific discussion, informing our People Plan 2025-2030, exploring what CTMUHB does well and needs to keep and scale up, what we need to change or stop doing, and voice our hopes and visions of the organisation we want to be in 2030. These discussions, alongside research and the 4,000 colleagues who responded to the Staff Survey in 2024, have directly shaped our People Promises and priorities.

We have continued to grow our Staff Networks and bring them together to host combined learning events and promote intersectionality and widely share their collective responses to key analyses and data sets – including both our Gender Pay Gap and the Workplace Race Equality Standard. Our partnership with local colleges has grown, with 54 supported interns, all with learning disabilities and/or autism, completing placements across the Health Board, with teams including Pharmacy, IT, Catering and Radiology.

Our CTM2030 Community Leaders' Network continues to work together to improve health and wellbeing in our region, including reducing barriers to vaccine uptake and improve access to health information. This partnership work has directly informed this winter's vaccination strategy, particularly for older adults and underserved groups.

Colleagues have worked with local communities, including schools and workplaces, to develop the Healthy Travel Charter, and engaged further with residents to develop community growing spaces, provide nutrition education and retail policies as part of our Health Weight Programme. We have partnered with Community Voluntary Councils to host a large engagement event aimed at exploring women's physical, emotional, and psychological wellbeing, including over 140 women from 30 voluntary sector organisations.

We worked with our Staff Networks and Welsh Language team to launch an improved Equality and Welsh Language Impact Assessment process, with subject matter leads providing additional support for policy development leads, ensuring equity is fundamental to decision-making.

Next year, we will embed a revised governance, assurance and delivery framework for EDI, further emphasising engagement and involvement, providing more opportunities for conversation and learning, and better measuring the impact of what we do. This work will include improving how we use our Staff Networks and other groups to improve our Equality and Welsh Language Impact Assessments.

Sustainable Public Services and Procurement

CTMUHB has a well-developed Anchor Organisation strategy, with a key focus on embedding social value in procurement. CTMUHB procures goods, services and works worth in excess of £641 million a year. This ranges from the purchasing of medicines, food and linen, to other services such as contracts to renovate or build new capital developments.

As the lead agency for procurement for the NHS in Wales, NHS Wales Shared Services Partnership (NWSSP) aim is to promote and increase the use of local contractors, SMEs and third sector businesses and to encourage subcontracting of these entities as part of procurement activity. The rationale is that by investing locally NWSSP are making our supply chains more resilient and providing local social value and wellbeing impacts. CTM's Welsh spend is currently £301 million per annum (43.75% of total supplier spend).

NWSSP has also developed competitive tender strategies to promote social value and wellbeing, combining pass / fail criteria with a minimum 10% weighting at tender stage for Sustainability Criteria This reflects the sustainability, foundational economy and decarbonisation aspirations of NHS Wales. There is also a pass/fail question for the inclusion of carbon reduction plans.

Challenges and Lessons Learned

Identifying challenges and lessons learned is crucial for continuous improvement and to solve problems, foster growth, promote transparency, and inform future strategies.

The Health Board and trade union partners have identified the following as notable challenges in carrying out the requirements of the Duty:

- Balancing operational demands with meaningful depth and timeliness of engagement, to enable genuine co-production and ensure staff confidence in the process. This includes the need to ensure trade union representatives have sufficient time and notice to engage sufficiently.
- There remains a need for more robust mechanisms to ensure frontline staff perspectives are consistently captured and acted upon.
- Ensuring consistency in partnership working across departments, including consistency in the provision and timeliness of data.
- Formal training on the Social Partnership Duty was limited in the initial implementation phase. Trade unions have supplemented this with briefings to representatives, but further consideration needs to be given to structured training to ensure a consistent understanding and application of the duty.
- We need to continue to iterate and improve on our people metrics, to ensure that we have meaningful and measurable outcomes to track progress.

In undertaking the requirements of the Act, the following learning points have been consistently reinforced:

- Early and continuous engagement leads to more effective policy and service development, review and implementation.
- Shared ownership and accountability with trade union partners is critical, with joint responsibility for finding solutions as well as identifying issues.
- Strong leadership commitment is critical to fostering a culture of partnership.
- There needs to be a move to sharing the challenges experienced along with the great work that has taken place, to allow openness and partnership working and improve outcomes for patients and staff.

Future Priorities

CTMUHB has identified the following priorities:

Invest in Relationships and Behaviours

- **Leadership development** for managers and trade union colleagues on partnership principles (i.e. mutual respect, co-production, early engagement).
- **Build trust through visibility:** senior leaders to regularly attend TU meetings, and listen to TU representatives' views, demonstrating that these views are heard via agreement of tangible actions.
- **Create safe spaces** for informal dialogue to reduce adversarial dynamics and nurture problem-solving. It is recognised that there is still further work to do in this space to create an environment of healthy and constructive debate and innovation.
- **Promote understanding of trade union roles** and foster constructive engagement with senior leadership across CTMUHB.

Strengthen Structures and Processes

- **Embed the Social Partnership Duty:** Advocate for and develop frameworks to strengthen change management practices and service transformation, in collaboration with frontline staff and trade union partners.
- **Clear escalation and feedback loops** between local partnership groups and national fora (e.g. Welsh Partnership Forum).
- **Reinforce the need for early sharing and consultation** aspiring to seek constructive agreement with trade union partners on relevant policies and programmes of work. This includes the need to ensure trade union representatives have sufficient time and notice to engage appropriately.
- **Review and promote our wellbeing objectives:** Establish a workstream including trade union partners to review our wellbeing objectives. This will include communications and engagement strategy to ensure these are more visible to our staff, partners and stakeholders.

Build Capacity and Capability

- **Actively promote the Social Partnership Module** in ESR to both trade union representatives and staff and monitor completion rates.
- **Consider developing targeted training** programmes on social partnership, workforce rights, and leadership development, to embed a culture of continuous learning.
- **Incorporate social partnership principles** as part of leadership and management training to equip future leaders within the Health Board.
- **Expand partnership working** with third-sector organisations and community groups.

Conclusion

CTMUHB and our trade union partners remain committed to upholding the principles of social partnership, ensuring that our workforce and stakeholders play an active role in shaping the future of healthcare across the region.

Through continuous engagement, collaboration, and shared decision-making, we aim to improve working conditions, enhance service quality, and deliver better health outcomes for our people and population. We recognise that our People Plan for 2025- 2030 is rightly ambitious and anticipate that this will be contributing factor to successfully demonstrating our commitment to the Social Partnership framework going forwards.

We will continue to strive for an approach that reflects the spirit – not just the letter- of the Social Partnership Duty.



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