

## LEARNING BY EXAMPLE:

# A CASE STUDY OF PARTNERSHIP RESOURCE CENTRE PRACTICES THE AUBERT HOME OF COMPASSION

## A Case Study Commissioned by the Partnership Resource Centre



PRC case study series no. 6

The purpose of this occasional paper series is to provide case studies and other publications to promote best practice and share experience in partnership approaches.

The Partnership Resource Centre thanks the team at the Aubert Home of Compassion and the Service & Food Workers Union and the New Zealand Nurses Organisation for their time and valuable contribution to this case study.

The views expressed in this occasional paper do not necessarily represent the views of the Department of Labour.

ISBN 978-0-478-28212-2

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## 1. Introduction

Aged care has always been a physically and emotionally demanding part of the health care sector in which to work. In recent years, increased demand through societal and demographic changes, increased compliance requirements, and skill shortages have placed additional pressure on those working in this sector. One New Zealand organisation facing such challenges is the Aubert Home of Compassion.

The Aubert Home of Compassion (Aubert) is a rest home and hospital based in Wanganui. It is one of a number of New Zealand homes of compassion owned by the Sisters of Compassion. In 2006, the Partnership Resource Centre (PRC) was invited to work with the team at Aubert and the relevant unions on a project intended to bring about a positive shift in relationships and culture in their workplace and, in doing so, better address their current concerns.

This report is based on the findings of a case study by Martin, Jenkins & Associates<sup>1</sup> and highlights how the PRC worked with the employer and the unions on a joint project to help create a workplace culture they can be proud of.

### The Aubert Home of Compassion

Aubert first opened its doors in 1931, and it has the capacity to fill 59 beds, providing both rest home and hospital-based care. It moved to its current site in 1964 and was refurbished extensively in 1999. The home is governed locally by a Board of Directors based in Wanganui. Like all the Homes of Compassion, it is overseen by a Compassion Trust Board based in Wellington.

There are 79 staff at Aubert working in a range of occupations including nursing, administration, gardening, maintenance, kitchen, laundry and cleaning services, diversional therapy and caregiving. There is a mix of casual and permanent staff.

Two unions cover staff in this workplace: the New Zealand Nurses Organisation and the Service & Food Workers Union.

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<sup>1</sup> Learning by Example: A Case Study of Partnership Resource Centre Practices. Commissioned by the Partnership Resource Centre, Department of Labour. March, 2008.

## 2. Contextual Influences

In order to build a constructive workplace relationship between a union and an employer, both parties need to gain a deep appreciation and recognition of the influences that could help or hinder an effective partnership. There were two main influences on the Aubert partnership project: those external factors relating to the aged care sector and those factors specific to this Home of Compassion. Both contributed to the breakdown in workplace relations, but both also included the “seeds” for successful partnership development.

### The aged care sector

Caring for the aged is demanding, both physically and emotionally. Services are needed on a 24-hour basis. Duties include heavy lifting and meeting personal needs, and death and grief must be coped with on a regular basis. Historically under-funded, many positions in this sector are “low skilled”, and consequently, pay has been low compared with the other health care sectors.

Changing societal and demographic trends have also meant that the work has become even more demanding. Overall, the population has a longer life expectancy, and people typically access aged care services in a more dependent state compared with previous generations. Labour shortages are a problem; there’s a particular need for individuals with a mix of operational skill and management experience.

Legislative changes, such as enhanced Holidays Act provisions and the introduction of health care standards for aged care services, has meant increased costs and compliance requirements. An accreditation programme was introduced by the Ministry of Health in 2004 to help providers show compliance with the new standards. While the process of preparing for accreditation is described as stressful and time-consuming (it takes two years), it does offer providers a way of attracting residents and supporting more stable occupancy rates.

### Internal factors: the Aubert Home of Compassion

When the project began, it was evident that a number of negative factors specific to Aubert had exacerbated

the pressures of the sector and contributed to the development of negative workplace relationships.

For instance, Aubert had a unique governance and management arrangement, which was hierarchical in structure and style. Prior to the partnership project, information sharing in Aubert tended to be upward from staff to the manager and to the Board. The governing Board was relatively invisible to most staff. The problems with information flow were highlighted when Aubert sought to be re-accredited. Recognising this, the Board hired a consultant to work with the manager on the re-accreditation process. However, while the Board received additional information via the consultant, the level and regularity of information shared with staff did not change.

The continued hierarchical upward style of communication created a sense of distrust and anxiety among all staff. While the Board itself was aware and concerned about increasing pressures on staff, staff viewed the Board as invisible, obstructive and unsupportive.

The nature of the care and duties required to support residents also contributed to a level of workforce duality and multiple workforce cultures. Two dualities were evident: rest home versus hospital staff, and caregiving versus other services.

The two types of care – rest home and hospital – are separated by the physical layout of the home. Rest home care is upstairs, while hospital care is downstairs. Hospital care tends to be more demanding, with the more fragile residents in care. Hospital staff tend to work more cooperatively, and it is seen as more rewarding work. The rest home residents are more independent. Rest home staff tend to work more autonomously and felt isolated compared with their team-spirited hospital counterparts.

Another duality existed between the different occupations and level of contact with residents. Caregiving staff are qualified professionals, usually employed in permanent full-time positions, and have regular direct and ongoing interaction with residents. A number of other staff, such as kitchen, cleaning and maintenance staff, provide other critical, but less direct, services for residents. They tend to be lower skilled and more likely to be employed casually or part-time. Their work is also more time pressured and repetitive, and the staff generally felt less valued. These differences led to an “us and them” culture.

Like the rest of the aged care sector, Aubert has been affected by the ongoing challenge to find enough suitably skilled staff. It was also becoming apparent that certain employees were engaging in inappropriate and divisive behaviour that fuelled conflict in the workplace.

## Supporting factors

Despite the challenges noted above, there are some other factors that actually work in Aubert’s favour when it comes to partnership.

For instance, Aubert’s founding principles continue to guide and influence the organisation. The home was established 77 years ago by Sister Suzanne Aubert to provide support for the “vulnerable and the overlooked”. The eventual inclusion of two Sisters on the current Board has ensured that these altruistic principles would continue to be relevant. The Board members’ willingness to address the divisive workplace culture was guided by their awareness that the situation was philosophically inappropriate given Aubert’s founding principles and the nature of caregiving work.

Aubert also has a number of long-serving employees. These committed and experienced staff hold an institutional memory of a happier workplace and provide a source of stability. Partnership resonated with their recollections of the past, and these staff were able to informally and positively promote the project’s values across the workplace.

Some key staffing changes also contributed to the project’s success. These included the appointment of an independent consultant and a new manager (both prior to the project) and a new Board chairperson (during the project). As newcomers, the consultant and the manager were not captured by the workplace conflict to the same extent as current staff. Both were able to create an environment open to change and were committed to building a more positive workplace.

The new chairperson happened to be a long-serving Board member and a local GP who consulted at Aubert. As he was already known and visible to the operational staff, they were more confident that he would be able to communicate their commitment and concerns to the Board.

## Motivations for the project

The factors and influences outlined above gave Aubert a number of reasons to want to be part of the partnership project and confront some major issues for the organisation, including the following:

- **Limited closed workplace communication:** Increasing workload stress prompted staff to report a range of concerns about their working conditions and inappropriate behaviour of other staff. However, the culture of the workplace and the governance and management structures were not conducive to clear and shared discussion about such issues. Staff were frustrated by the lack of full, regular and consistent information sharing.
- **Distrust and conflict between staff and management:** Wider sector pressures and poor communication saw a significant level of distrust emerge between staff, management and the Board. Staff also tended to bypass managers in favour of talking directly with union organisers.
- **Ongoing adversarial relationships:** In the 18 months prior to the project, protracted conflicts, formal written complaints and negatively focused union involvement were commonplace. Distrust between union and management also contributed to difficult wage negotiations.
- **Negative public profile:** Local knowledge of the workplace difficulties at Aubert spread when a staff member approached the local media. A newspaper article resulted in damage to Aubert's reputation, making it difficult to recruit suitable staff and reducing occupancy rates as families became concerned about Aubert's quality of care.
- **Demoralised fatigued workforce:** The collective impact of all these symptoms contributed to extremely low workplace morale and general fatigue among staff.

Collectively, these factors helped identify a clear focus for the partnership project: to realign the workplace culture and practice with the philosophy and intent of Aubert's founding principles. In August 2006, the "Creating a Culture We are Proud of Project" began.

## 3. Associate Practices

The Partnership Resource Centre (PRC) provides a range of support services to organisations wanting to develop workplace partnerships. To help do this, the PRC engages a group of Associates – independent consultants with wide knowledge and experience in industrial relations and organisational development. The PRC provided two Associates to work with Aubert and the unions on this project.

The practices used by the Associates followed a typical action-learning cycle and can be broadly classified into three categories: planning and scoping, implementation and reflection.

### Planning and scoping

It was helpful that both the Associates were already familiar with the issues affecting the aged care sector. They anticipated that the workforce would be divisive, demoralised, reluctant to speak openly and highly sceptical about any change process. Over three days, the Associates insisted upon talking with all staff, including managers, Board members and union representatives.

The discussions that followed were fairly unstructured, allowing individuals to raise key issues without prejudice or constraint. Individuals were asked to talk freely about what they were doing, what they loved about what they did, and their experiences and feelings about Aubert. This inclusive approach was critical in gaining the parties' trust and commitment to a process from the outset.

The scoping questions enabled the Associates to identify the underlying causes of workplace conflict, its impact and the likely opportunities and challenges in developing a partnership. More importantly, these discussions enabled the Associates to gauge the parties' willingness to change and to participate in a change process. In particular, they were interested in the parties recognising themselves (not the Associates) as being the key players in creating positive workplace relationships.

Following reflection on the visit, the Associates devised a plan and the strategies they would use to support the parties in a partnership development process over the next 12–18 months.

## Implementation

Typically, PRC Associates draw upon a variety of techniques and tools to help parties develop a workplace partnership, blending their use as necessary. Associates in the Aubert project were no exception and used an extensive range of techniques. For the participants, the following exercises stood out and contributed significantly to a positive change in Aubert’s workplace culture.

### The four “Fish!” principles

Associates introduced the parties to four key concepts known as the Fish! principles<sup>2</sup>. These principles emerged out of the workplace experience of a fish market in Seattle and, in essence, capture the underlying aspects of a successful business and workplace practice in a straightforward and non-threatening way. In summary, they are:

<b>PLAY</b>	Finding ways to have fun while accomplishing serious goals.
<b>BE THERE</b>	Being fully and genuinely engaged in the tasks you take on at any point.
<b>CHOOSE YOUR ATTITUDE</b>	Recognising that personal attitudes shape actions and that each person can make a choice to view things positively if they want to influence and support positive outcomes for themselves and others.
<b>MAKE THEIR DAY</b>	Recognising that no matter how small, gestures of care and kindness transform people’s emotional well-being and are an easy and rewarding way of gaining job satisfaction.

The Associates saw these principles as perfectly applicable to Aubert’s desire to realign the culture of the workplace with its spiritual and community focused values. The principles themselves were also a way to energise and lift the dispirited and tired workforce.

<sup>2</sup> Lundin, S. Paul, H. and Christensen, J. Fish!: A Remarkable Way to Boost Morale and Improve Results. Hodder & Stoughton. London, 2001.

The Associates ran workshops with different representative groups, which included videos and discussion about how the Fish! principles could be applied in their workplace.

While there was a degree of scepticism, overall, the majority of staff were motivated and open to the key messages inherent in these principles.

### The horseshoe exercise

During a large collective workshop organised by the Associates, participants were asked to form themselves into a horseshoe shape with the newest and longest serving staff at opposite ends. This exercise served to place everyone on an equal footing, breaking down the multiple divisions and hierarchical structures, and instead recognising the considerable length of service Aubert staff have – both individually and collectively.

Generating a shared appreciation of staff loyalty and commitment helped focus participants on Aubert’s core purpose: caring for vulnerable and fragile members of society.

### Interest-based negotiation training

A year after the project began, there was a need to renegotiate Aubert’s collective agreements. Union organisers, delegates and Aubert management were concerned that their past difficulties could resurface in the negotiation process, compromising their ability to continue applying partnership principles in their workplace relationships.

While acknowledging their concern, the Associates saw this as an opportunity to demonstrate the value of partnership principles. The Associates designed a series of exercises and supporting guidelines to enable the parties to approach the negotiation process from an interest-based problem-solving perspective. This involved revisiting the partnership goals of the project and exploring the two contrasting styles of negotiation: adversarial and interest-based. By working through scenarios, Associates were able to challenge the parties’ behaviours and help them embed an interest-based approach.

The power of this approach was consistently described by participants as one of the most significant points in the project; it represented the moment when they began to translate their understanding of partnership into observable partnership attitudes and behaviours.

## Reflection

A fourth strategy that contributed to the project's success was critical reflection. As noted earlier, reflection is one of the three broad practices that make up PRC Associates' typical action-learning approach.

Critical reflection is the process of analysing, reconsidering and questioning experiences within a broader context with a view to learning from past experiences and using this to plan the approach for the future. The process can take a number of forms, from observations, to asking questions, to using theory to help make sense of what is going on. It can occur at different levels within a change process, for instance, visibly and explicitly when working "in the moment" with participants (for example, while working through scenarios), or retrospectively, such as when Associates are professionally reviewing their actions.

The majority of reflection done in the Aubert project was visible "in the moment" interaction with groups and individuals. The Associates' skills were clear to the participants as they responded to issues raised and the various relationship dynamics that emerged. If anything came out of left field, the Associates knew how to make sense of it.

## 4. Achievements

From April 2006 to November 2007, the Aubert partnership project resulted in a range of positive changes for the organisation and for individuals. Some of the main improvements are highlighted below.

### Clarity of organisational purpose: the BHAG

A core concern for the partnership project was the need to realign the workplace culture with Aubert's founding principles. The lack of a shared goal or a statement about the culture they needed had previously created a vacuum – a space instead filled by the emergence of a negative workplace culture.

The Associates worked with the parties to develop a "big hairy audacious goal" (BHAG) to help them articulate the kind of culture required to support their shared goal. The BHAG is "to be the leading aged care service in the

Southern Hemisphere". This gives staff a clear sense of purpose and a shared commitment to the partnership principles as a way to realising this goal.

### More effective management

Prior to the partnership project, management decisions were not shared with or did not involve staff. One outcome of the project was the establishment of a leadership team with a wider mix of representatives involved in management decision-making. This has enabled staff concerns and management decisions to be expressed more directly and regularly. It has also led to more effective problem-solving, with Aubert's manager able to draw on the ideas and insights of a broader range of staff.

### Problem-solving skills

Decisions about Aubert's rostering schedule were always a point of contention for management and staff prior to this project. The Associates worked with staff to show an alternative way of resolving problems using the roster issue as an example.

A collectively designed and workable roster was agreed by the participants, by:

- defining an end goal
- considering the issues
- validating key issues with data
- identifying elements to a successful roster
- generating multiple options
- evaluating the options against success criteria.

Staff acknowledged that learning and using these problem-solving skills was time-consuming but that it has resulted in more positive and sustainable outcomes.

### Occupancy

Aubert's average rest home occupancy level has increased from 97.2% in 2005 to 102.36% in 2007<sup>3</sup>. This is considered a particular achievement by Aubert management given that the process of being assessed to provide rest home services is demanding and a competing rest home had recently opened close by.

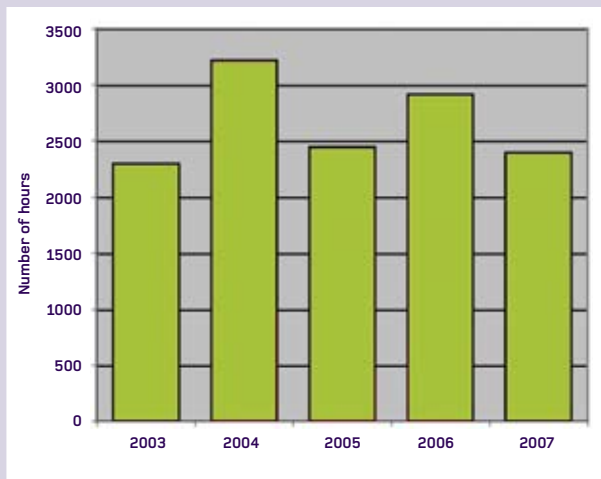
<sup>3</sup> The rest home average occupancy rates exceed 100% due to the fact that rest home residents are sometimes placed in hospital beds but are still counted as rest home residents.

## Positive negotiation experience

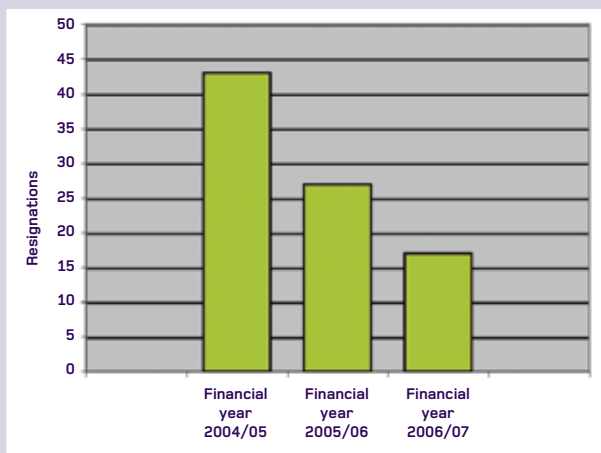
Despite the introduction of two new union organisers to the workplace, the 2007 collective agreement negotiations were effectively completed in four hours and in a collaborative fashion. There was even unanimous agreement in the voting rounds.

Pivotal to this was the more transparent, honest and cooperative approach adopted by the senior managers and union representatives. The new organisers commented that the positive and open attitude of the employer representative was critical in enabling them to participate in the negotiations in a partnership-focused way. There is also added value in the individuals involved being able to apply their new skills to other conflict situations.

**SICK LEAVE HOURS PAID**



**STAFF RESIGNATIONS 2004/5 – 2006/7**



## Improved pay and conditions

A significant achievement in the project was the improvement to union and non-union members' employment conditions. The agreements included retaining long-service leave as separate to the increased four weeks' annual leave entitlement and an increase in wages. While the increase in wages was possible because of an associated increase in government funding, partnership principles guided the parties to an agreement that would also cover non-union employees.

## Increased job satisfaction

The majority of staff now report feeling more valued and aware of events happening within their workplace. Staff describe improved communication flows and opportunities for input into decision-making. It should be noted, however, that some groups of staff feel improvements have been limited. This view is most common among kitchen, cleaning and maintenance staff whose participation in the project was more constrained by the time pressured nature of their work.

This finding is further supported by improved sick leave levels and resignation rates. In 2007, following the project, sick leave hours used were at their lowest level since 2003. In the 2006/7 financial year, resignation rates were less than half what they were in 2004/5.

## Increased participation in education and training

As the partnership project gained ground, staff and management saw education as a natural part of achieving Aubert's BHAG. As a result, staff participation in educational training has increased. For instance, the hours of attendance at in-service training for caregivers and nurses in 2007 were almost double the attendance hours in 2005.

## Stronger team culture

Aubert staff report a much stronger sense of team from participating in the project. This was aided by the Associates' consultative approach and the use of the Fish! principles. Staff sought ways to embed a stronger team spirit and culture into the workplace and developed a variety of strategies including Fun Days based around

a theme (for example, the Melbourne Cup) and the Good Ideas Book. This new team dynamic is visible despite the continued physical separation between the rest home and hospital care services.

## More positive language

Individuals involved in the project have acquired a range of new skills and improved understandings about the role and contribution of positive language in improving workplace relationships. This has been critical in sustaining their commitment to the project and increasing confidence to challenge those whose language and behaviour does not align with Aubert's goals and the partnership approach.

## 5. Concluding Comments

### Success factors

The achievements made clearly show that this project has been a success. The parties also seem to be well placed to continue extending partnership principles across the workplace. On reflection, there are certain features in the Aubert project that proved to be significant to these results and are worth noting.

- **Aubert's "social good" values and mission:** The organisation's altruistic founding principles and core purpose provided a clear rationale for change, justifying the parties' commitment to the project. As a result, support for the project was widespread across the workplace and strongly supported by both union representatives. All parties wanted an end to the animosity in the workplace because it conflicted so much with Aubert's core purpose. This provided the genuine shared commitment "on both sides of the fence" and the energy for the change process.
- **A systematic approach to identify the core drivers of workplace conflict:** The Associates used a systematic approach to assess the workplace issues and help the parties focus on the central drivers of the conflict in the workplace. This approach enables a comprehensive examination of different aspects
- **An inclusive and representative process:** The Associates' were insistent about the need to create the space for all participants to express their concerns and surface issues before deciding on any specific activities. The strongly inclusive focus enabled all principal personalities and a majority of employees to have some input into setting the goals of the project. This established a broad level of employee ownership and gave a sense of hope that change was possible. While a number of operational staff could only participate in the initial stages of the project, their initial participation still helped them to develop a broad level of commitment that could be tapped into over time, giving the project some resiliency. The gradual but steady involvement of different layers of staff also enabled the Associates to lead the project "from behind" and eventually hand over direction of the project to Aubert staff.
- **Key staffing changes:** The departure and subsequent replacement of two key management level staff (prior to the project) and a new Board chairperson (during the project) acted as a cultural circuit breaker to create an environment more open to change. Each individual supported change, and collectively, their personal strengths and different approaches acted as a catalyst for change. In particular, the appointment of the new chairperson, who was already well known to the operational staff, forged better linkages between the governance, management and operational levels of Aubert and supported the partnership approach.
- **A mixed history of workplace relationships:** The history of workplace relationships at Aubert also shaped the parties' commitment to a partnership approach. Aubert had a mixed history of being a positive workplace, as well as (more recently) a

of the workplace so that the workplace system as a whole is considered. The parties are then able to draw connections between their specific issues, the workplace context as a whole and their vision for change. With the drivers of conflict clarified, the parties were able to develop a shared goal, clear priorities and an associated framework for the project's activities. This clarity of understanding also helped the parties progress the project's activities in between the Associates' visits, and they became increasingly alert to the risks or factors that might derail the project's focus.

highly conflicted one. This meant that many long-serving staff already had an intuitive appreciation of partnership based on past positive experiences and were able to connect to the project relatively easily.

- **The use of collective negotiations as a positive opportunity:** Typically, employer and union parties will have a history of adversarial and negative employment relations and tend to view collective agreement negotiations as a potential threat to the development of a partnership approach. The Associates used the upcoming negotiations at Aubert as an opportunity to practise working in partnership. The learnings that resulted were a critical turning point for those involved, enabling them to shift their attitudes and behaviours in the subsequent negotiations.
- **Ongoing reflection:** In addition to the systematic inclusive approach used in this partnership project, ongoing reflection by the participants was critical. In particular, “in the moment” reflection helped the parties understand and value the process of partnership development more deeply. The common core goal (i.e. a positive workplace culture) was used as a standard against which to reflect during specific activities. Participants were able to consider if and how their responses and behaviours in specific project activities reflected their core goals. They were also able to continually practise and embed partnership behaviours – even when the Associates weren’t there.

## Looking forward

The experience, new skills and visible change in the workplace environment has given Aubert staff the incentive and confidence to sustain and extend partnership principles across the workplace. This confidence is demonstrated in the consistency with which staff describe the resilience of their new team culture and their willingness to challenge those whose language and behaviour does not align with it. But while the parties are confident about their ability to sustain the partnership approach, they are also aware of the likely challenges ahead.

Going forward, the first challenge is to extend the influence of partnership principles to those staff who have yet to fully participate in the project. They include the casual, part-time and night shift staff who were

just not able to participate in the project’s activities to the same extent as others. The intention is to continue spreading the message through role-modelling and working with the delegates.

Monitoring long-term progress is also a challenge. While significant attitudinal shifts have occurred, the signs are subtle (for example, changes in language and behaviour). Gauging the extent to which attitudinal shift is continuing across the workforce is a potentially unwieldy process, but management will be looking into what sorts of future reporting strategies could be used.

In any case, when considered in light of the previously negative and conflicted nature of the workplace interactions at Aubert, the positive changes of the current workplace are noticeable indeed.

*“We’re a bit lucky really, we’ve been offered this whole process, at no cost to us and we’re very aware of how much work has gone into it and what it would cost us if we had to pay for it. But I tell you, if we knew that this would be the outcome and we had asked the cost, we would probably have done it anyway – no question.”*

**Aubert Board member**

The Government established the Partnership Resource Centre (PRC) in October 2004 to work with employers and unions in building new positive relationships in the workplace. At the core of the PRC's work is the idea that constructive relationships between employers and unions are important in achieving innovation, growing productivity and improving service delivery.

There's a strong focus on the process in the PRC's work: workplace partnership offers a way to identify the objectives that benefit both the employer and the union, and share the ownership of outcomes and problems. By recognising the value of the different perspectives of these "partners", workplace partnership can provide a framework and a springboard for building longer-term relationships based on cooperation.

The PRC offers expertise and resources to advocate workplace partnership among employers and unions, to act as a catalyst for partnership, and to provide a range of support services to organisations wanting to develop workplace partnerships. To help do this, the PRC engages a group of independent consultants with wide and varied knowledge and experience in industrial relations and organisational development. Typically, these "Associates" of the PRC help unions and employers develop the skills and processes needed to build their partnership by focusing on critical issues in their workplace.



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