 <p><b>BAY OF PLENTY</b> DISTRICT HEALTH BOARD HAUORA A TOI</p> <p><b>CLINICAL PRACTICE MANUAL</b></p>	<p><b>WORKFORCE DEVELOPMENT MENTAL HEALTH &amp; ADDICTION SERVICES</b></p>	<p><b>Protocol CPM.M5.8</b></p>
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## ORGANISATIONAL STRATEGY

Nurturing and sustaining the workforce and developing workforce / sector capability are the two guiding priorities of the Mental Health and Addiction Services (MH&AS) Workforce Development strategy.

## PURPOSE

- To ensure an equitable and consistent approach is applied to the consideration and subsequent endorsement/non-endorsement of staff training applications.
- To ensure education funding is dispersed in an equitable and sustainable manner that encourages professional and sector development.
- To ensure that clinical standards are maintained and improved through in-service and external training programmes.

## EXCLUSIONS

- Medical Officers and Clinical Psychologists
- Registered Nurses (RNs) engaged in tertiary studies and using the Post-Graduate Nursing Education Funding pathway via Health Workforce NZ bulk fund and Skills Matter funding via workforce development centres.
- Allied Health Professionals engaged in tertiary studies accessing Skills Matter funding via workforce development centres.

## STANDARDS TO BE MET

### 1. In-Service Training Description

- 1.1 The in-service training programme is co-ordinated and delivered by the MH&AS Educators under the supervision of the Nurse Leader, MH&AS. Priorities for clinical teaching are:
  - a) Assessment and management of clinical risk
  - b) Mental Status Examination, comprehensive assessment, care delivery and management
  - c) Legal frameworks to practice
  - d) Outcomes measurement strategies and application to clinical work
  - e) Dynamic therapeutic strategies
  - f) De-escalation and personal restraint
- 1.2 The in-service programme will be facilitated where possible by the MH&AS Educators and/or current employees with expertise or interest in the subject area.
- 1.3 The in-service programme agenda will be prioritised annually by the Professional Advisor Group and Service Managers and will focus on specialist clinical and therapeutic knowledge and skills. Decisions about the in-service priorities will be informed by the annual Learning Needs Analysis / internal surveys, and include consultation with Service Managers, the Educators and Professional Advisors Group. This will then be submitted via the governance structure for final sign-off.

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#### 1.4 Applications for in-service training

- Fliers advertising in-service events will be circulated in a timely manner
- Staff wishing to attend an in-service event should obtain the support of their Team Leader / Line Manager
- Unless special circumstances apply, staff wishing to attend in-service events will complete the slip at the bottom of the advertising flyer **only** and forward to their Team Leader / Line Manager for approval.

#### 1.5 Approval of in-service training applications

Team leaders **may** approve in-service training applications having considered the following guidelines

- Relevance to role and functions
- Relevance to identified professional development as outlined in annual performance appraisal
- Relevance to identified service development
- That staff can be released to attend the training and service delivery can be sustained in their absence

## 2. External Training Description

### 2.1 Conferences

### 2.2 Workshops

### 2.3 Tertiary or post-graduate courses.

2.4 External providers may be contracted to provide specific programmes locally, consistent with the annual training agenda agreed by the Professional Advisor Group. Applications to attend these trainings will comply with the external training criteria.

#### 2.5 Applications for External Training

##### a) *Applicant responsibilities*

- All required application forms must be completed in full
  - Learning Investment Form
  - Travel and Accommodation Request Form
  - Study leave Form
  - Conference / Course registration form
- Applications must be forwarded to the Service Manager in a timely manner. Late applications will only be considered in special circumstances at the Service Manager's discretion.
- Incomplete applications will be returned to the applicant by the Service Manager's.
- Applicants must detail the relevance of the training or professional conference to their current role, their professional development plan or service's operational plan.
- Applicants will be expected to present feedback from the course / conference at an in-service training within 6 months of attending the event. Applicants should arrange this with the MH&AS Educators.
- In the event that the application is declined, the reason for the decline is to be stated on the Service Manager Checklist and forwarded to MH&AS Management Admin Support for action. The applicant may appeal this decision. Please see Appendix 1 flow chart.

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## 2.6 Approval for External Training

- a) Service Manager's may approve / decline external training applications having considered the following guidelines:
  - i. Relevance to role and functions
  - ii. Relevance to identified professional development as outlined in annual performance appraisal
  - iii. Relevance to identified service development
  - iv. That staff can be released to attend the training and service delivery can be sustained in their absence
  - v. That all relevant application and registration forms are completed in full
  - vi. That the training may be supported within the budget
  - vii. Consult the applicant's professional advisor and obtain signed approval as appropriate
- b) Preference should be given to applications that:
  - i. Align with service development or improvement initiatives.
  - ii. Enhance synergy between nurturing and sustaining individual staff and the development of sector / organisational capability.
- c) Applications should be processed systematically. For example, if more than 1 application is expected for a training event, ensure that all applications are held as a discrete group and vetted together, implementing criteria above to guide decision-making.
- d) Service Manager's must complete Service Manager Checklist For Applications For External Training (see below) and detail any specific conditions that may apply.

## 2.7 Guidelines for Funded Support

- a) Refer to [BOPDHB policy 2.3.3 Protocol 1](#).


## 3. **MH&AS Management Administration Support**

- 3.1 Ensure that approved nursing applications are submitted to the Nurse Leader, Allied Health Leader or Professional Advisor Psychology for approval in a timely manner.
- 3.2 Ensure applications are complete, all requisite permissions (e.g. DON, COO) have been obtained, and that the letter of approval accurately reflects any special conditions and has been sent to the applicant. Process any relevant paperwork e.g. registration, travel and accommodation request etc. in a timely manner.
- 3.3 Record the training in the budget database and on staff training record.
- 3.4 Liaison with Service Managers and professional advisors group occurs in a timely manner in the event that approved training exceeds the budget.
- 3.5 Promotional material about external training course is distributed to Service Manager's, Team Leaders and Line Managers in a timely manner.
- 3.6 Budget reports are available to the Professional Advisors Group as requested and that quarterly "mandatory training reports" are sent to the Service Managers.

## 4. **Budget**

- 4.1 The Workforce Development budgets are held by the Nurse Leader, MH&AS and will be confirmed in consultation with People & Capability, Decision Support Analyst and the Business Leader. Decisions will take into account:
  - a) The number of FTE attached to the service
  - b) Allocated funding levels per discipline

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- c) External training expenditure for each service area over the last 2 financial years
- d) Local and national strategic plans for workforce development.
- 4.2 The database for training budgets will be accessible to the Professional Advisor Groups and Service Managers as a read-only document.
- 4.3 Entries into the training budget database will be co-ordinated by MH&AS Management Administration Support attached to Workforce Development. Service Managers are expected to refer to the database before approval of all training applications. It is the responsibility of the Service Managers to ensure their budget can sustain the training fee or registration, travel and accommodation costs.
- 4.4 The actual training budget for nursing is managed by the DON. To assist Service Managers in their decision-making, the training budget database will include a “virtual” amount commensurate with the number of nursing FTE within each branch of the service. Sign off authority for Nursing is the DON via the Nurse Leader, MH&AS.
- 4.5 Sign-off authority for external allied health training will be held by the Professional Advisors group. Only fees and associated costs for applications that have been approved by Service Managers will be disbursed.
- 4.6 The In-service programme will be allocated a discrete budget, in consultation with the Business Leader, Decision Support Analyst and Professional Advisor Group.
- 4.7 In the event that individual services exceed the allocated budget for the financial year, the Clinical Co-ordinator will advise the Professional Advisor Group. Any further investment in external training for that service for the remainder of the financial year will be at the discretion of the Business Leader, in consultation with the Service Manager, Decision Support Analyst and the Professional Advisor Group.

## REFERENCES

- NZS8134:2008 Health and Disability Services Standards

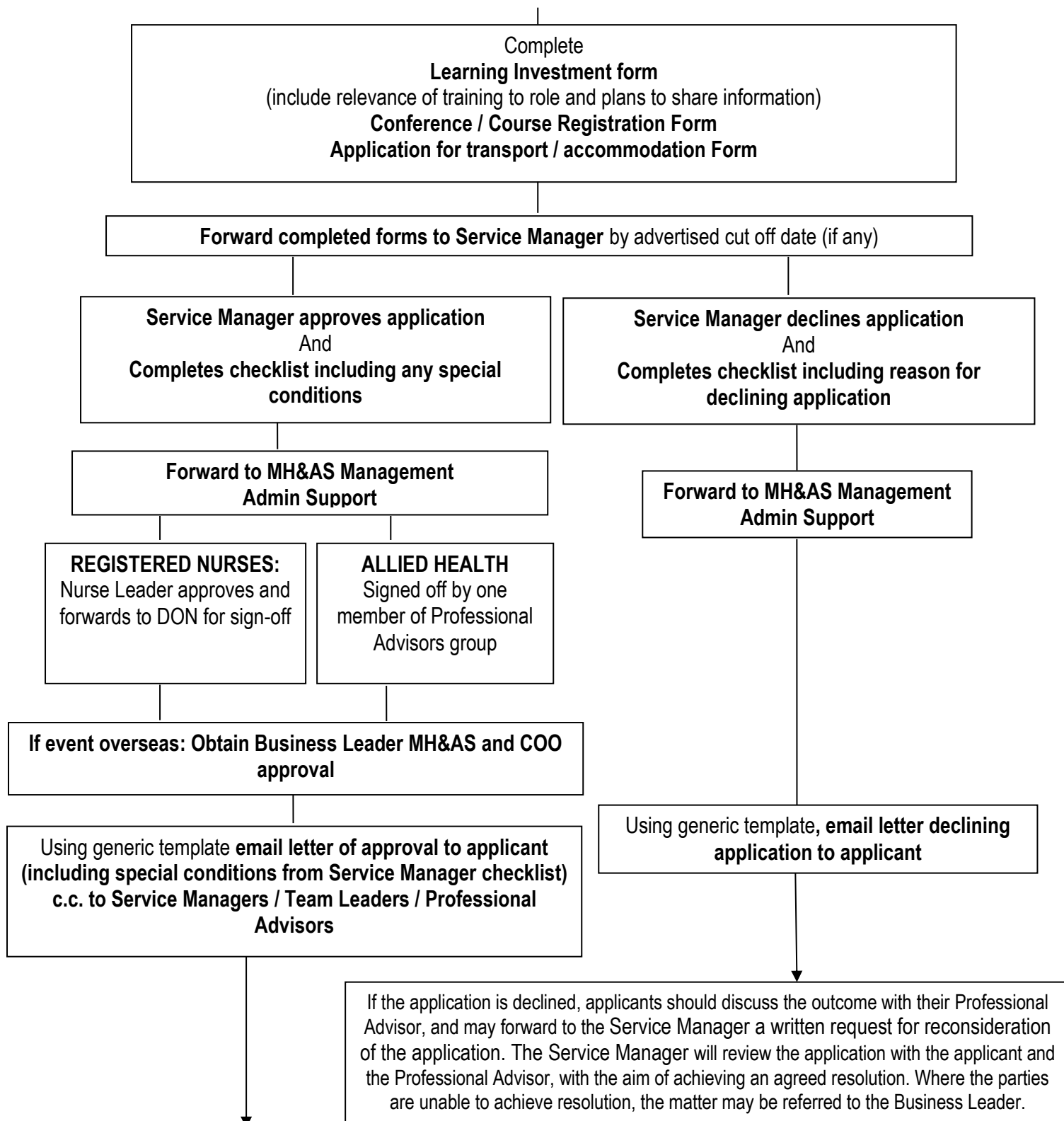
## ASSOCIATED DOCUMENTS

- [Bay of Plenty District Health Board policy 3.50.00 Employment Relationships](#)
- [Bay of Plenty District Health Board policy 3.50.04 Education](#)
- [Bay of Plenty District Health Board policy 3.50.04 protocol 1 Education Guidelines](#)
- [Bay of Plenty District Health Board policy 2.3.3 protocol 1 Staff Travel and Accommodation Standards](#)
- External Training Application Checklist

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## Want to attend an external training?



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