

Bay Of Plenty DHB Māori Health Provider
Māori Workforce Development Toolkit



Toolkit



BAY OF PLENTY
DISTRICT HEALTH BOARD
HAUORA A TOI

2009 - 2010

Acknowledgements

The Korite Project wishes to acknowledge the expertise and support of the project reference group.

Kathy Grace	Poutiri Trust MDO
Kiri Peita	BOP DHB Māori Planning and Funding Unit
Sharon Muru	Toi Te Ora - Public Health Service
Dr George Gray	Toi Te Ora - Public Health Service
Lynda Hare-Rangitauira	Western Bay PHO
Candice Porter	Te Ao Hou PHO
Dr Neil de Wet	Toi Te Ora - Public Health Service for project advice

The project would also like to acknowledge *Toi Te Ora Public Health Service* for its contribution of workforce development resources and the *Bay of Plenty DHB Māori Planning and Funding Team* for project, resource and monitoring support.

Kaati, e kore te reo mihimihi e moe...



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What is workforce development?

Workforce development has evolved from a narrow focus on the individual to a much broader and holistic concept that now includes workforce analysis and planning, human resource management and capability development.

Workforce development encompasses thinking and action at the:

Systems level government policy, legislature, funding, Awards, infrastructure;

Organisational level strategic planning, management and leadership, performance measurement, succession, supervision, mentoring, culture and workplace;

Individual level career planning, professional training and development, openness to change and innovation, commitment to best practice;

This integrated, tiered, approach is needed to address such complex issues as global labour shortages, the pace of change and an ageing population.

The aim is to strengthen organisations by aligning the workforce to both current and future service demands.

These days, workforce development can describe any one of a relatively wide range of policies and programmes related to 'learning for work'.

KORITE

The Korite workshop focuses mainly at the organisational and individual level. It is designed to help managers plan effectively and ensure they have the right people in the right jobs at the right time.



Why is it important?

In the future the sector will experience:

- An ageing population and an ageing workforce increasing the need for effective succession plans;
- A more ethnically diverse society and workforce;
- Increased competition for highly skilled employees;
- More technological advances playing a greater role in improving efficiency and productivity;
- An increasing demand for services;
- A more informed client.

More people will want to work differently, more flexibly, as they juggle work / life balance.

More people will be comfortable in switching not only roles and jobs but careers, during their working life, so organisations may not be able to expect employees to stay as long as they used to.

Workforce Planning Benefits

- Helps prepare for the growing number of retirements / staff turnover.
- Helps identify gaps between current job skills and job skills needed to perform work in the future.
- Helps maintain or recruit a diversified workforce in order to keep doing the business.
- Provides a process to help address new changes, either within or external to the organisation, that impact on the workforce.
- Helps prepare for expansion, restructuring or reduction of particular work categories.

What does the Korite Workforce Planning Project offer?

Korite project offers each organisation the opportunity to:

- Attend a workshop directly focussed on developing a workforce plan and process for your Hauora
- Access to a toolkit of resources specifically designed for workforce planning
- On-going individual or group support to complete the WFD plan
- A chance to help evaluate the project
- Link to the BOP DHB Māori Workforce Development Plan: Korite.

The Ministry of Health Perspective

The Strategic Imperatives Model was developed by the New Zealand Ministry of Health for workforce development. The five 'strategic imperatives' are:

1. Infrastructure Development

Creating a nationally relevant infrastructure

2. Training and development

Co-ordinating disparate elements into a model with a qualifications framework that meets service provider requirements and takes into account existing competencies.

3. Retention and recruitment

Developing a national and regional response and producing medium to long-term solutions through regional and national collaboration.

4. Organisational development

Develop the organisational culture and systems necessary to sustain the workforce - improving workers skills and the work environment.

5. Research and evaluation

To ensure information is available to the sector to inform workforce development and gain a better understanding of the effectiveness of workforce development expenditure.



Figure 1: The Strategic Imperatives Model.



Korite Guidelines on Getting Started

1. *Be strategic*

Ensure your workforce planning considers and links to a) strategic sector policies and goals and b) local Iwi, hapū or Māori community directions and goals. The sector includes the MOH, DHBs, Regional groups e.g. Midlands; PHOs, MDOs etc

2. *Be inclusive*

Include references to your own organisations policies and procedures in your final workforce plan that has a connection to workforce development

3. *Aim for alignment*

Ensure all your plans, goals and objectives agree with each other.

4. *Meet current compliance obligations*

Develop the competency of current staff to ensure you can successfully deliver current contracts and services to the community.

5. *Plan for the future*

Look ahead and plan growth and development. What kind of workforce will you need in 5, 10, 15 years time?

6. *Be deliberate, creative and collaborative*

There are many ways to develop, educate and train a workforce. Get together with others to discuss ways in which you can support one another to do this. Plan ahead and prioritise.

7. *Create a culture of on-going learning and sharing within the organisation*

Many situations can incorporate learning and teaching opportunities

HANDY TIPS

- ***Practice selective hiring***

Recruit the right people in the first place and recruit for talent and the longer term, not to fill an existing job. This avoids having to train backwards before you can train forwards.

- ***Leverage your experience, resources and knowledge***

Build on what you're already good at and what you already have. Everyone a learner, everyone a teacher. Exploit economies of scale.

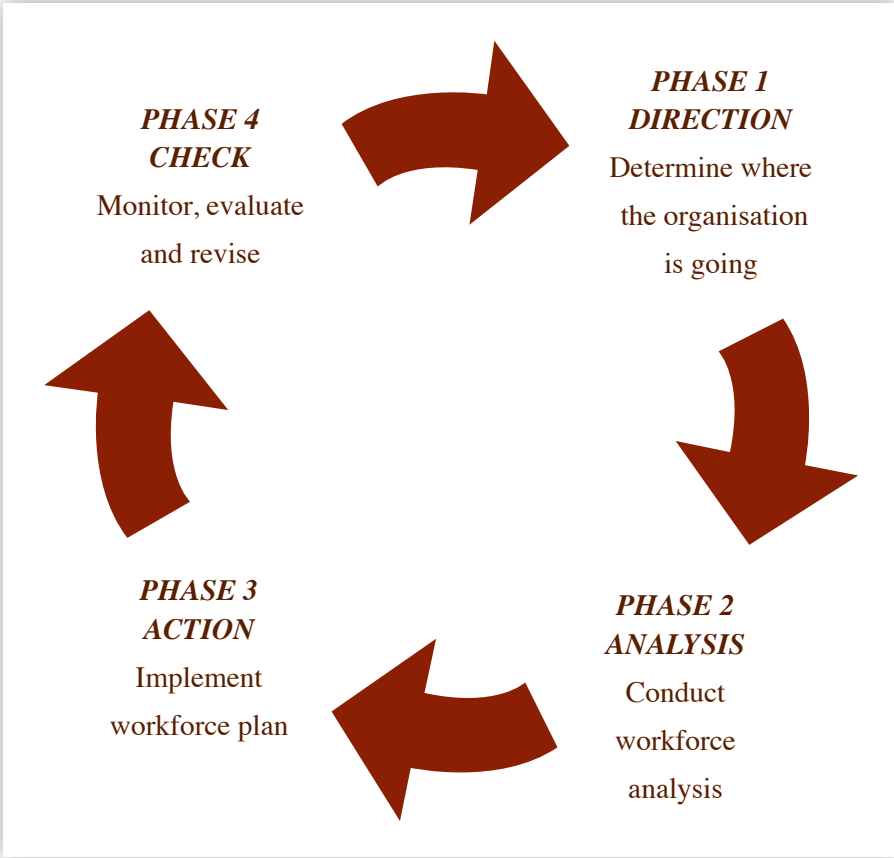
- ***Health workforce development is a multi-stakeholder, multi-level operation***

It may be worth allocating workforce development as a specific portfolio to someone within the organisation to coordinate and manage. Most definitely it should become an integrated part of the management review process.

The Workforce Planning Cycle

Many organisations and sectors have developed or adapted different models for workforce planning, to suit their own unique circumstances, clients’ needs and goals. Except for some of the language and the order in which steps are arranged, the models are basically similar. All workforce plans should aim to address the sector and the organisation’s critical staff and training needs, including the overarching issue of workforce sustainability.

Figure 2. Korite workforce planning cycle



The Korite workforce planning cycle is a simple four phase approach that can easily be adapted to fit any organisation. The key to its success is in its ability to deliver outcomes, and so there is a focus on strategic input, thorough analysis and a realistic action plan which is reviewed and measured as part of the organisation’s regular business planning process.



Korite Workforce Planning Cycle - *Phase 1 Strategic Direction*

Introduction

A strategic plan sets out clearly where an organisation is going and describes the goals, objectives and strategies it has chosen to achieve them in a way that makes it easy to measure progress and success. Once this process is completed, it becomes clear as to where the budget and resources should be allocated and what the workforce needs are.

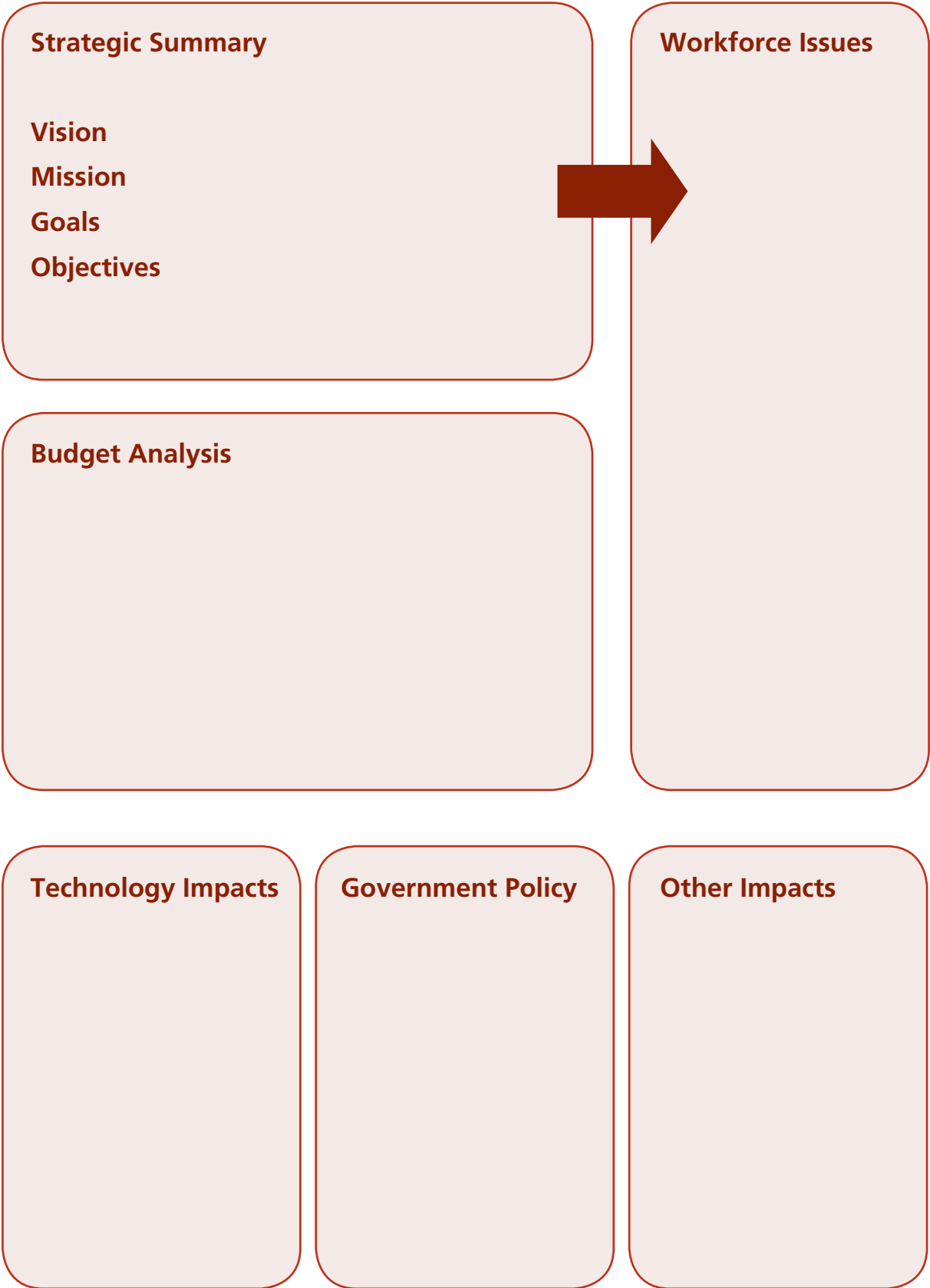
A Community Needs Analysis or similar survey should have been conducted as part of the strategic planning process, and so this step is not repeated here.

Key questions

- How many / what types of jobs and skills are needed to meet the organisations mission and strategic goals?
- What strategies should be used to hire, retain or teach these skills?

Action Checklist

Action	Who	When	Done
1. Review the organisations strategic plan and identify the mission, key strategies, goals and workforce issues			
2. Are there changes planned that will affect the workforce? Note these down.			
3. Find out what the budget estimates for workforce development are. How do budget issues affect the current or future workforce?			
4. Find out whether changes in technology will affect the way work is performed.			
5. Find out whether current, new or anticipated government policy will affect the organisation / workforce.			

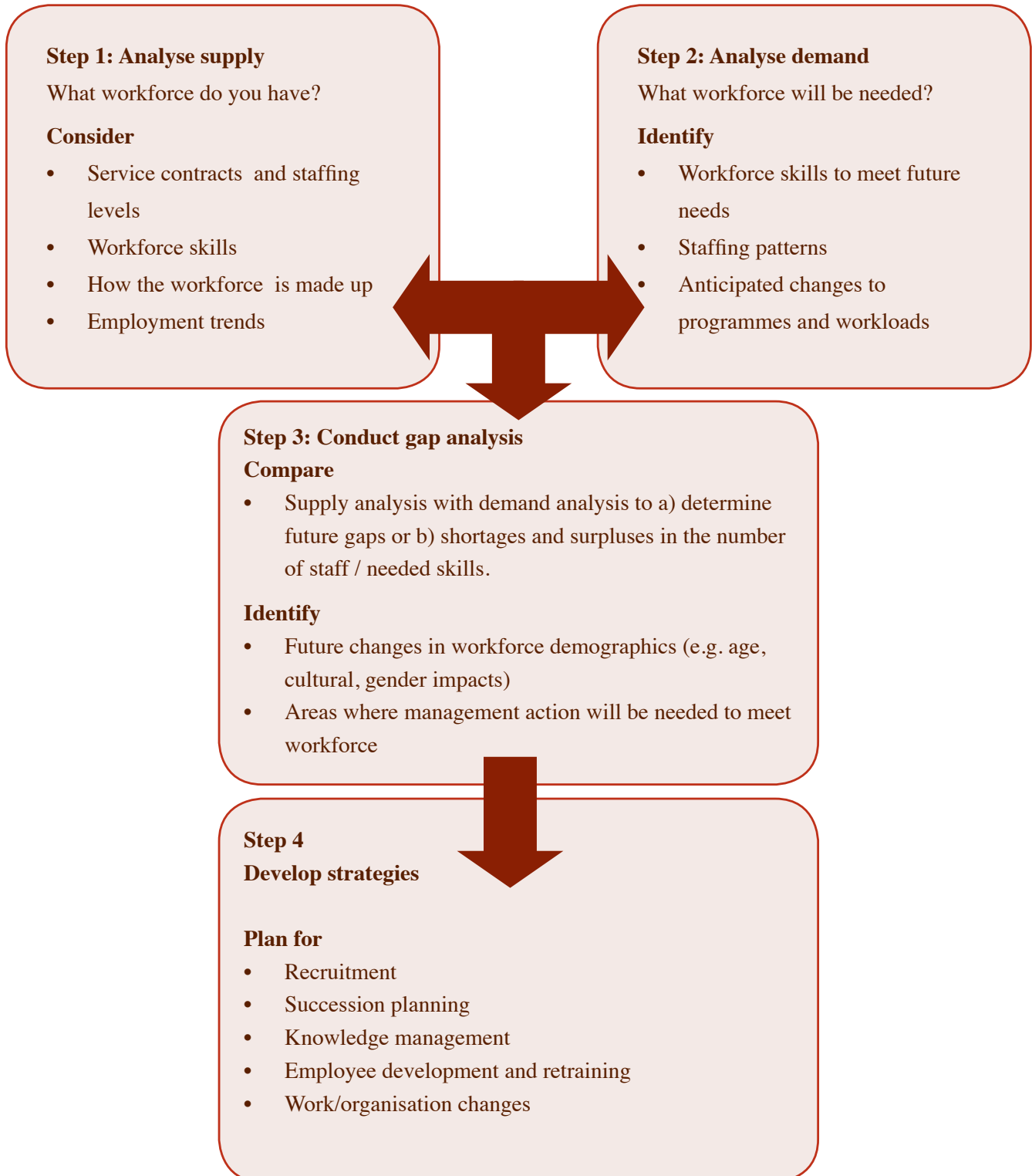




Korite Workforce Planning Cycle - Phase 2 Workforce Analysis

Gathering and analysing data about the workforce is an important part of the workforce planning process.

A four-step approach is suggested.



Korite Workforce Planning Cycle - Phase 2 Workforce Analysis

What to do - Action Checklist - *Phase 2 Step 1*

Action	Who	When	Done
1. Identify employees' ages, genders, ethnicity, education and qualification levels and length of service.			
2. Draw up a skill profile. Identify critical knowledge, skills and abilities that high performers use to achieve success.			
3. Identify workforce management issues that affect the organisations workers.			
4. Discuss with managers and other team leaders which areas of the workforce are currently or potentially vulnerable. Note down.			
5. Review retention, turnover, promotion patterns, leave usage and retirement patterns			
6. Does staff turn-over affect the organisations ability to do its work?			
7. Why do people leave the organisation? (Use Exit surveys if available).			
8. Project what the skill and experience level of the current workforce will be in the future.			
9. How have retirements, hiring freezes, restructuring or job losses affected the organisation in the past?			
10. What challenges may affect the organisations ability to recruit and retain key skills in the future?			



Mauriora Hauora Workforce Plan - *Draft Example 2*

Workforce Profile

General summary

Future projections

General summary

Workforce management issues affecting workforce supply

Step 2

Introduction

This analysis looks forward and identifies the workforce needed in the future to carry out the organisation's mission. Focus on the work that the organisation must do and the staff that will be needed to carry out that work.

Key questions

Within the organisation

- What internal factors are affecting / could affect the workforce?
- Will the way the work is being done need to change?
- Will new programmes/services be added or deleted?
- Will current employees have the necessary skills to do the work in the future?
- Will the workload change?
- Will more or fewer employees be needed?

Externally - outside the organisation

- What is happening within the sector? Regionally? Nationally?

Data sources

- The strategic plan
- Environmental scanning and analysing trends

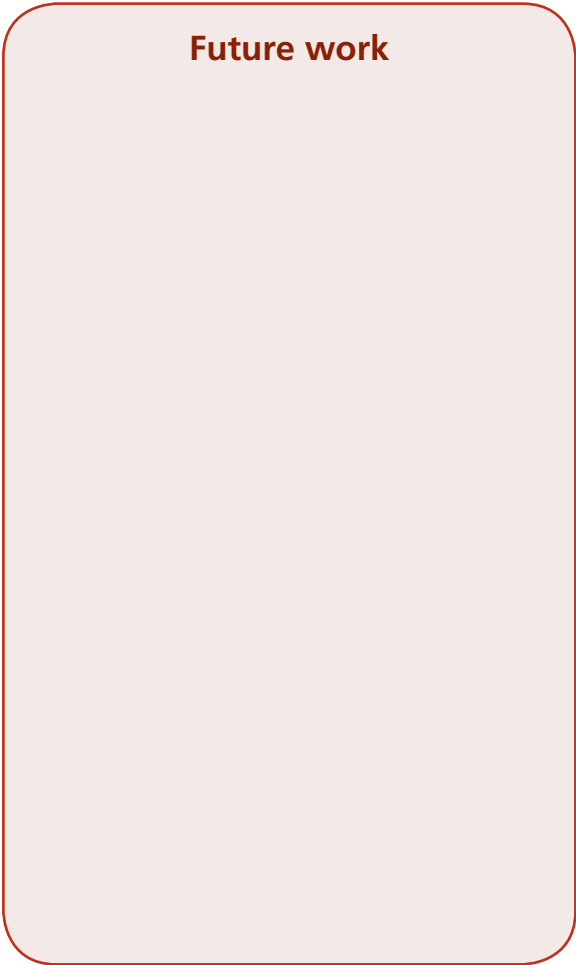


What To Do - Action Checklist - *Phase 2 Step 2*

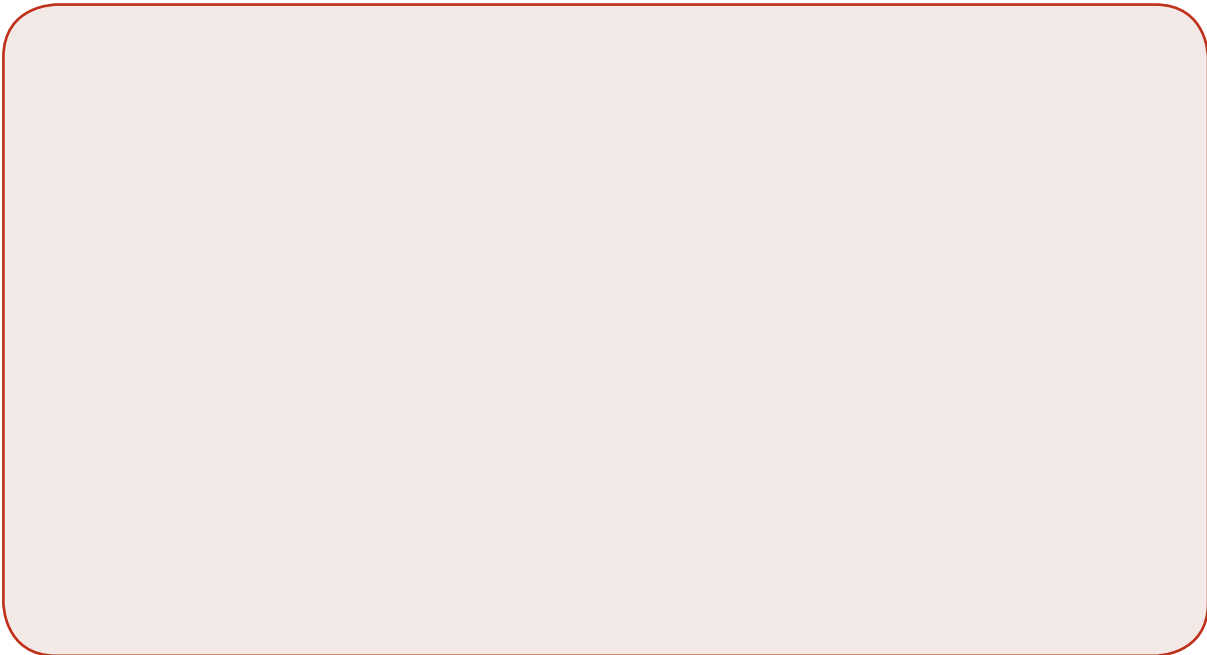
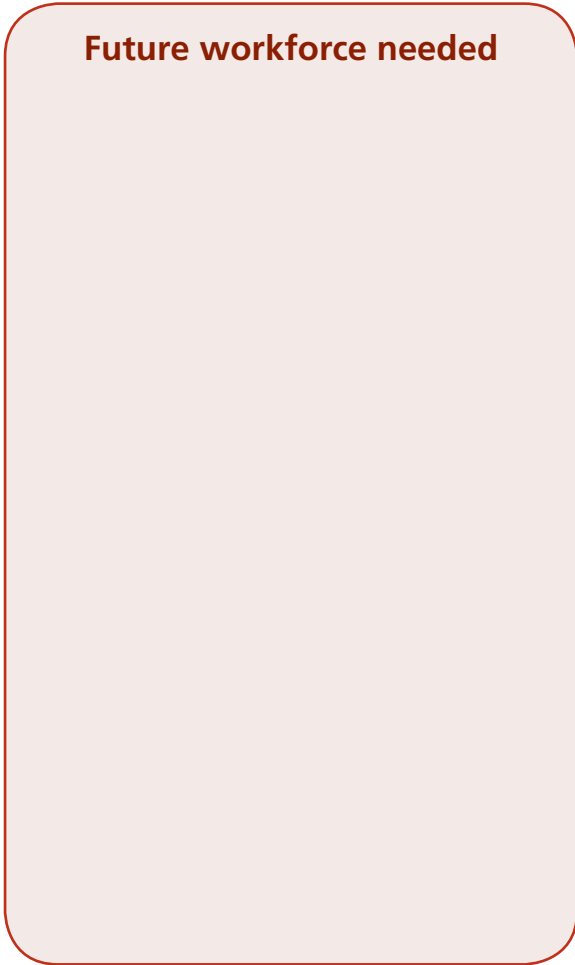
Action	Who	When	Done
1. Find out how population and community changes might influence the demands placed on the organisation e.g. ageing population			
2. Investigate how technology can and will be used to improve service provision and identify jobs that will be affected by technological changes.			
3. Decide whether changes to technology will affect the number of employees needed to do the work or the type of skills workers will need.			
4. Note how the economy affects the organisation and its provision of programmes or services.			
5. Take note of any labour trends that are relevant to the organisation.			
6. Take note of student information available from educational institutions.			
7. Identify issues associated with the use of non-permanent staff, including cost and supply.			



Future work



Future workforce needed





Korite Workforce Planning Cycle - *Phase 2 Gap analysis*

Step 3

Introduction

Gap analysis compares the workforce that an organisation has today with the kind of workforce it predicts it will need in the future. The organisation will establish workforce strategies based on the results of this analysis which may show one of the following:

- A gap indicating a future shortage of needed workers or skills. It is important to know what critical jobs will have gaps so the necessary training or recruiting can be anticipated and a crisis approach to workforce can be avoided.
- A surplus indicating a future excess in some categories of workers. The analysis may show that some occupations or skills will not be needed in the future or at least will not be needed to the same extent.

Key questions

1. What new skills will we need to accomplish our goals and objectives?
2. Does our workforce currently have the anticipated needed skills?
3. What job functions or skills will no longer be required?

Action	Who	When	Done
1. Compare information about the existing workforce with future projections to identify future gaps (shortages) and surpluses (excesses) in the number of staff needed and needed skills.			
2. Identify changes in the future workforce demographics e.g. workers will be more diverse, younger, more qualified etc.			
3. Identify areas in which management will have to focus in order to reach workforce objectives.			

Gaps (shortages) projected

Surpluses projected

Management actions necessary to reach workforce objectives



Korite Workforce Planning Cycle - *Phase 2 Strategy Development*

Step 4

Introduction

The final step in the workforce analysis phase involves the development of strategies to address future gaps and surpluses. Strategies are the programs, policies, and practices that assist the organisation in recruiting, developing, and retaining the critical staff needed to achieve its mission and strategic goals. It also assists in dealing with workers or skills no longer needed.

Strategies can fall into the broad categories of:

Actions to do with 'classifying positions' within the organisation

- Including redefining job titles, adding new jobs, reallocating jobs, and rewriting job descriptions to better reflect future functional requirements.

Actions to do with 'salaries'

- Including equity adjustments, promotions, and merit increases that may be needed.

Staff development and succession planning strategies

- To prepare employees for specific positions, titles, or occupations.
- Ensuring that there are highly qualified people capable of filling critical positions.

Recruitment/selection strategies

- To find and hire recent school graduates or qualified candidates from other agencies or the private sector.

Retention strategies

- To encourage employees to stay in the organisation.

Knowledge transfer strategies

- To capture the knowledge of experienced employees before they leave.

Making Things Work

Strategies should be kept to a **manageable number** so they can be achievable, and they should be **prioritised** to allow the organisation to focus its resources on the **most important strategies first**.

Several factors influence which strategy or combination of strategies should be used. Some factors are:

- Time** Is there enough time to develop staff internally for vacancies or new skill needs, or is recruitment the best approach?
- Resources** What resources (e.g. technology, templates, and plans) are currently available to provide assistance, or do resources need to be developed?
- Internal depth** Does existing staff demonstrate the potential or interest to develop new skills and assume new or modified positions, or is external recruitment needed?



Korite Workforce Planning Cycle - *Phase 3 Implement Plan*

Introduction

Once the organisation has chosen and prioritised specific workforce strategies a separate action plan for the implementation of each strategy will probably need to be drawn up.

Success factors

Other success factors will include:

1. Ensuring there is executive level support for the strategies
2. Adequate resources allocated to carry out the strategies
3. Clear roles and responsibilities to carry out the strategies
4. Realistic time lines
5. Clear performance measures, milestones and deliverables.
6. A communication plan that ensures key people are well informed.

Keeping up to date

Because the workforce plan is so closely linked to the organisation's strategic plan, any changes that occur at that level may need to show adjustments in the workforce plan strategies.



What to do - Action Checklist - *Phase 3*

Action	Who	When	Done
1. Choose specific workforce strategies appropriate for the organisation (based on the analyses)			
2. Prioritise the strategies in order of most important first.			
3. Ensure strategies have Executive level support.			
4. Allocate adequate resources to implement strategies.			
5. Determine clear roles and responsibilities to carry out plan/s			
6. Determine realistic time lines for the plan/s			
7. Develop clear performance measures, milestones and deliverables for the plan so progress can be measured			
8. Develop a communication plan to ensure all key people are well informed			



Mauriora Hauora Workforce Plan - *Draft Example 4*

Workforce strategy

Priority 1

Workforce strategy

Priority 2

Workforce strategy

Priority 3

Korite Workforce Planning Cycle - *Phase 4 Check Progress*

Monitor, evaluate and revise

Introduction

Ongoing evaluation and adjustments are important in workforce planning and the key to ensuring situations change for the better.

Workforce plans should be reviewed annually and should become part of the management schedule, perhaps linked to the staff performance appraisal process. Failing to do so means the organisation risks being unprepared for changes and unable to deliver on its mission and goals.

Key questions

1. What is working and not working?
2. Have the organisation's strategies changed?
3. Do the strategies need revising or reprioritising?
4. Is our workforce data still valid?

What to do - Action Checklist - *Phase 4*

Action	Who	When	Done
1. Schedule an annual review of workforce planning (link to other management review or appraisal events)			
2. Review performance measurement information and link to workforce planning			
3. Assess what is working and what is not and adjust the plan and strategies to suit. Choose new priorities where needed.			
4. Address new workforce and organisational issues			
5. Report significant findings to management and Board.			



Workforce Planning Questionnaire Template

When completed this questionnaire should help organisations to develop a baseline workforce plan that links to the strategic plan, and can be expanded in detail over subsequent years, as time permits and new tools are developed.

Phase 1

Overview

Describe the vision, mission, strategic goals, objectives, and business functions of the organisation. Discuss what changes, if any, may take place over the next three to five years that could affect the organisation's mission, objectives, and strategies.

Basic information to include in the workforce plan

- Organisation's vision and mission
- Organisation's strategic goals and objectives
- Core business functions
- Anticipated changes to the mission, strategies, and goals over the next three to five years

Phase 2

Step 1- Current Workforce Profile

Describe the organisation's current workforce by assessing whether current employees have the knowledge, skills, and abilities needed to address critical business issues in the future.

Basic information to include in the Workforce Plan

- Demographics information, including age, gender, ethnicity, and length of service
- Percent of workforce eligible to retire
- Organisation turnover
- Projected employee turnover rate over the next three to five years
- Workforce skills critical to the mission and goals of the organisation

Step 2 - Future Workforce Profile

Develop a future business and staffing outlook. Determine trends, future influences, and challenges for the organisation's new and at-risk business and workforce composition.

Basic information to include in the Workforce Plan

- Expected workforce changes driven by factors such as changing missions, goals, strategies, technology, work, workloads, and how work is done
- Future workforce skills needed
- Anticipated increase or decrease in the number of employees needed to do the work
- Critical functions that must be performed to achieve the strategic plan

Step 3 - Gap analysis

Identify gaps (shortages) and surpluses (excesses) in staffing and skill levels needed to meet future requirements.

Basic information to include in the Workforce Plan

- Anticipated surplus **or** shortage in *staffing levels*
- Anticipated surplus **or** shortage of *skills*

Step 4 – Strategy Development

Develop prioritised strategies for workforce development.

Basic information to include in the Workforce Plan

List specific goals to address workforce gaps or surpluses which may include the following:

- Changes in organisational structure
- Succession planning
- Retention programs
- Recruitment plans
- Career development programs
- Leadership development
- Organisational training and employee development



**KORITE WORKFORCE
DEVELOPMENT
PLANNING PROJECT**



BAY OF PLENTY DHB MĀORI
HEALTH PROVIDER

**WORKFORCE
DEVELOPMENT
TOOLKIT
RESOURCES**



Toolkit Resources

1. Strategic and political alignment chart	30
2. National Workforce Development Goals	31
(Whānau Ora, He Korowai Oranga, Whakatātaka tuarua, Te Uru Kahikatea, Te Kōkiri, Raranga Tupuake, Tauawhitia Te Wero.)	
3. Workforce SWOT analysis template	38
4. Priority skill development planner (Workforce priorities)	39
5. Gap analysis template	40
6. Contract portfolio template	41
7. Approaches to workforce development template	42
8. Budget template	43
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10. Quarterly staff professional development planner	56
11. Application to attend professional development or training	57
12. Professional development / training report form	50
13. Training record template	51

Strategic And Political Alignment

It is important to be aware of key goals, objectives and priorities set by the sector, by the Iwi/Community and any other umbrella body your health organisation are affiliated to, in order to be aligned with current directions, policies, and funding initiatives.

Strategic Iwi or Māori Community goals and priorities

Iwi Health Plans



Network goals and priorities compliance goals and priorities

e.g. Poutiri Trust - WBOP, PHO & EBOP PHO

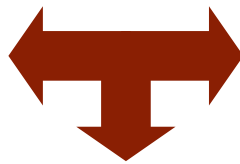


Organisational policies

e.g. Mauriora Community Hauora Services



Contract



FUTURE

MOH, DHB, Regional goals and priorities

- He Korowai Oranga (& Whakatātaka)
- Raranga Tupuake (MOH, Māori WD Strategy)
- Te Uru Kahikatea (MOH, Public Health WD Plan)
- BOP DHB District Strategic Plan & District Annual Plan – available on the BOPDHB website
- Te Ekenga Hou – Māori Health Plan– available on the BOPDHB website
- Korite BOPDHB Māori WD Plan, HPOTW ; IHPs

¹He Pou Oranga Tangata Whenua: Tangata Whenua Determinants of Health Framework

²Iwi Health Plans



A Whānau Ora centred approach to service design and delivery

Aims						
Ngā kaupapa tuku iho	Whānau opportunity	Best Whānau outcomes	Coherent service delivery	Whānau integrity	Effective resourcing	Competent and innovative provision
Individual outcome indicators			Whānau associated outcomes			
Health status Employment Educational achievement			Capacity to care for each other Transmit knowledge and values Model healthy lifestyles Provide access to society and to te ao Māori Transfer language, culture and ethics between generations			



He Korowai Oranga: Māori Health Strategy

<p>Te Ara Tuatahi: Pathway 1 Developing whānau, hapū, iwi and Māori communities</p>	<p>Te Ara Tuatahi: Pathway 2 Increasing Māori participation throughout the health and disability sector</p>	<p>Te Ara Tuatoru: Pathway 3 Creating effective health and disability services</p>	<p>Te Ara Tuawha: Pathway 4 Working across sectors</p>
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Whakatātaka Tuarua – Māori Health Action Plan

<p>Fostering Māori community development Build on the strengths and assets of whānau and Māori communities</p>	<p>Increasing Māori participation in decision making Iwi and Māori communities and Government agencies work together in effective relationships to achieve Māori health objectives</p>	<p>Addressing health inequalities for Māori Reduce Māori health and disability inequalities through specific Māori health priorities</p>	<p>Encouraging initiatives with other sectors that positively affect whānau ora To ensure other sector agencies work effectively together to support initiatives that positively contribute to whānau ora</p>
<p>Building on Māori models of health Recognise and value Māori models of health and traditional healing</p>	<p>Increasing Māori provider capacity and capability Increase the capacity and capability of Māori providers</p>	<p>Improving mainstream effectiveness To improve access to, and the effectiveness of, mainstream services for Māori</p>	
	<p>Providing highest quality service Deliver services to the highest clinical safety and quality standards within available funding</p>	<p>Māori Health Plans To ensure a local and regional focus is maintained by DHBs and PHOs on the range of effective and quality services for Māori</p>	
	<p>Developing the Māori health and disability workforce To increase the number and improve the skills of the Māori health and disability workforce at all levels</p>	<p>Removing barriers and promoting participation of Māori who have a disability To remove barriers to Māori with disabilities and their whānau from fully participating in NZ society, including te ao Māori</p>	



Te Uru Kahikatea - The Public Health Workforce Development Plan

Goal 1: Develop an effective and sustainable public health workforce	
Goal 2: Support public health environments to grow and develop the public health workforce	
Themes	2009 Work plan priorities
Education and Training	Workplace based training of the GPHC across the public sector GPHC onto the NZQA framework Undergraduate tertiary public health qualifications (undergraduate health promotion/public health diploma) – relevant to Māori
Māori public health workforce development	Improve career pathways and leadership training for Māori Acknowledge and support the specialist skills for working with Māori whānau, hapū and Iwi to effectively improve health and reduce inequalities Ensure any new tertiary programmes developed are relevant and accessible to Māori
Pacific health workforce development	Increase understanding of public health and public health roles Improves information about the Pacific public health workforce and share with stakeholders
Public health sector professional development	Strengthen public health professional bodies to advance the professional development of their respective workforce disciplines
Wider public health workforce development	Improve the wider health workforce's (particularly primary health care workforce's) skills and knowledge of health promotion/public health
Workforce planning	Provide an effective resource that can be used by the public health sector to plan for current public health workforce needs and predict future public health need
Information, policy and research	Ensure that the public health workforce is included in the wider health workforce information programmes and planning
Supportive workplace cultures	Implement the Workforce Development Guidelines for Public Health Managers (WFD Guidelines) Develop a model to shape the way WFD funding is provided through contracts between MoH and organisations that provide public health services
Public health careers	Promote public health careers, including developing recruitment tools and materials (print and web based) Work with existing professional groups to increase entry numbers into under represented occupational groups in public health Improve the wider health workforce's understanding of public health

Te Kōkiri: The Mental Health and Addiction Action Plan 2006 - 2015

The 10 Leading challenges for action

Promotion and Prevention

Building mental health services

Responsiveness

Workforce and culture for recovery

Māori mental health

Primary health care

Addiction

Funding mechanisms for recovery

Transparency and trust

Working together



Raranga Tupuake Māori Health Workforce Development Plan 2006

Vision - to build a competent, capable skilled and experienced Māori health and disability workforce over the next 10 – 15 years		
<p>Goal 1: Te Raranga Tuatahi <i>Tuia te muka tangata i takea mai i Hawaiiiki:</i> Increase the number of Māori in the health and disability workforce</p>	<p>Goal 2: Te Raranga Tuarua <i>Te whiri i te mauri Māori ki roto i ngā mahi:</i> Expand the skill base of the Māori health and disability workforce</p>	<p>Goal 3: Te Raranga Tuatoru <i>Te Hononga ki ngā kete ako:</i> Enable equitable access for Māori to training opportunities</p>
<p>Action 1: Sustain relationships with key stakeholders to promote health and science as career options for Māori secondary school students</p>	<p>Action 1: Sustain relationships with key stakeholders to support Māori in the workforce, and supporting them to access learning opportunities and seek further qualifications</p>	<p>Action 1: Improve equitable access to quality post-entry clinical training for Māori</p>
<p>Action 2: Monitor strategies to increase the number of Māori working in the health and disability sector</p>	<p>Action 2: Build on engaging with other sectors to enable and support Māori to gain health qualifications</p>	<p>Action 2: Work with DHBs to provide training opportunities for Māori to develop health career pathways</p>
	<p>Action 3: Promote internships with accredited Māori providers</p>	<p>Action 3: Encourage Māori health provider organisations to support career pathways for their staff</p>
		<p>Action 4: Promote Māori models of learning and training</p>

Tauawhītia te Wero – Embracing the Challenge
National mental health and addiction workforce development plan 2006 – 2009

Goal 1

To ensure that national and regional infrastructure supports the ability of DHBs and NGOs to progress workforce development

Objectives

1.1

To ensure that the MH & ADD WFD infrastructure is well co-ordinated; allows effective communication and information sharing, networking and collaboration and reduces unnecessary duplication and inefficiency

1.2

To further develop and coordinate a set of national indicators for mental health and addiction workforce development, including specific indicators for the Māori, Pacific, child and adolescent, and addiction workforces

Goal 2

To assist mental health and addiction services to develop the organisational culture and systems necessary to sustain their workforce

Objectives

2.1

To continue to build leadership capacity within all mental health and addiction services

2.2

To build the capacity of mental health and addiction services to become organisations that are able to attract and retain staff

Goal 3

To develop a nationally co-ordinated response to issues of recruitment and retention

Objectives

3.1

To reduce the stigma associated with working in mental health and addiction so that more health and non-health staff are attracted to the sector

3.2

To ensure nationally co-ordinated recruitment to all mental health and addiction services, including locums and other temporary staff, which includes targeting under-represented groups such as Māori and Pacific workers

3.3

To build the capacity of all mental health and addiction services and related organisations to attract and retain staff



<p>Goal 4 To develop a regionally co-ordinated response to issues of recruitment and retention</p>		
<p>Objectives</p>		
<p>4.1 To ensure that DHB regions co-ordinate recruitment and retention strategies and policies in partnership with NGOs</p>		
<p>Goal 5 To align pre-service entry, orientation and ongoing development of mental health and addiction workers with service provision requirements</p>		
<p>Objectives</p>		
<p>5.1 To ensure that educational and training programmes meet the current and future needs of the mental health and addiction workforce and mental health and addiction services</p>	<p>5.2 To ensure that education and training leads to careers that attract and retain more staff</p>	<p>5.3 To ensure that all mental health and addiction workers caring for and treating Māori service users are familiar with Māori models of care</p>
<p>Goal 6 To co-ordinate the education, health and employment sectors</p>		
<p>Objectives</p>		
<p>6.1 To ensure that mental health and addiction education and training is co-ordinated with work in the wider health, education and employment sectors</p>		
<p>Goal 7 To ensure there is information available to the sector to inform workforce development</p>		
<p>Objectives</p>		
<p>7.1 To ensure that robust and uniformly defined data are collected across the whole of the mental health and addiction workforce to allow better workforce development planning, service quality improvement and forecasting</p>	<p>7.2 To develop mental health and addiction workforce development and planning capability across the sector</p>	<p>7.3 To utilise the current workforce in innovative ways to address staff shortages</p>

Workforce SWOT Analysis

Appraising an organisation’s resource **S**trengths and **W**eaknesses and its external **O**pportunities and **T**hreats, commonly known as **SWOT** analysis, provides a good overview of whether a situation is fundamentally healthy or unhealthy – in this instance, particularly with regards to workforce.

A well-thought out **SWOT** analysis helps an organisation to develop strategies that leverage off the organisation’s strengths, capture the best opportunities and defend against any threats to its ability to carry out its work.

Strengths (Internal Focus)	Weaknesses (Internal Focus)
Opportunities (External Focus)	Threats (External Focus)



Workforce Development Priorities - 3 Year Plan

Priorities	Operational			Management			Governance			
	Yr1	Yr2	Yr3	Yr1	Yr2	Yr3	Yr1	Yr2	Yr3	
	Generic competencies <i>Essential skills</i>									
	Professional competencies <i>Health sector</i>									
Technical competencies <i>Specialist professional skills</i>										



Identifying Current Or Future Staff Gaps

Current contracts	Current staff required	Future contracts	Future staff required



Current Contract & Service Compliances

Contract	Services	FTEs	Staff roles	Key tasks	Core competencies	Key qualifications



Approaches To Workforce Development

In groups identify a range of different approaches to workforce development. Include of low-cost, no-cost opportunities as well. Conduct a PMI (Plus, Minus and Interesting) on each approach

APPROACH	PLUS	MINUS	INTERESTING



Workforce Development - Budgeting

There are many 'hidden or related costs' associated with workforce development that need to be considered.

Course fee	Course resources	Travel Costs	Accommodation	Meals	Venue	Relieving staff	Other	TOTAL



Staff Training Needs Questionnaire

This questionnaire is designed to assist staff to identify key training needs.

Name:..... Role:..... Provider:..... Contact details:.....

In your current position, to what extent would you benefit from additional training in each of the following areas? (For each item, please tick the column that best corresponds with the importance you place on receiving training in this area)

Areas of training	No benefit	Some benefit	Great benefit
1. Māori health models			
2. Management/leadership			
3. Information technology			
4. Report writing			
5. Contract management			
6. HR management			
7. Client notes and care planning			
8. Te Tiriti o Waitangi			
9. Health information and resources			
10. Customer service skills			
11. Environmental health			
12. Project planning and evaluation			
13. Statistics and research methods			
14. Finance and budgeting, funding and contracts			
15. Quality (Policies & procedures, audits) accountability			
16. Facilitating groups, effective meetings			
17. Presentation skills			
18. Interpersonal communication			
19. Workplace wellness			



Areas of training	No benefit	Some benefit	Great benefit
20. Social marketing/media skills			
21. Survey design and implementation			
22. Strategic/ business planning			
23. Public speaking			
24. Working with territorial local authorities, community advocacy, submission writing and consultation documents			
25. Key health issues			
26. Physical activity			
27. Obesity			
28. Alcohol			
29. Mental health			
30. Diabetes			
31. Immunisation			
32. Other...			
33. Other training needs... please specify			

Workforce Development - Staff Calendar - Quarterly

There are many 'hidden or related costs' associated with workforce development that need to be considered.

Staff member	January	February	March	April



Organisation

Workforce Development & Training Request Form

This form should be completed in full by all employees, trustees or directors of the organisation, when seeking approval, including funding support, to attend workforce development or training. Kia ora.

Note Before submitting this request, please make sure you are aware of the organisation's policies relating to professional development and training, including budget allocations, training priorities, timeliness and authorisation.

1. Name

Position / role in organisation

Unit / Team Manager

2. Name of course/training

Training provider / organisation

Costs are payable to

Purpose of training

.....

.....

.....



Reasons for attending this particular training <i>What I hope to get out of it</i>	Link to current role and job description <i>How this training will improve personal or organisational performance</i>

3. Date or dates

Time

Venue

Distance from place of work

4. Does the professional development involve (*Please highlight or circle as appropriate*)

- Overnight/s stay away from home
- Travel out of town Travel overseas Travel insurance to be arranged
- Transport to be arranged
 If so, approx. estimated cost

• Accommodation and meals to be arranged

If so, approx. estimated cost

Other special requests or resources required (*for example, relief workers etc*)

.....

.....



5. **Cost of training** *Course/training*

Other costs

.....

TOTAL requested

NOTE

This training is approved conditional that a) you have not exceeded your allocated professional development budget or you have been requested to attend by the organisation and b) you agree to report back to the organisation at an agreed time after completing the training.

.....
Approved Not approved Authorising manager Date



Workforce Development & Training Report Form

Please give a comprehensive summary of the recent workforce development / training you have completed, highlighting:

- a) what was particularly useful for you in your current role and how you plan to integrate this into your work
- b) what may be useful to others in the organisation and why
- c) any thing else that was interesting or useful about the training opportunity that the organisation might benefit from in some way.

Signed (Name)

Date

Position



Professional Development & Training Record

Employee

Organisation

Position/s

Course	Provider and/or Facilitator	Qualification Endorsement	Date



Professional Development & Training Record

Employee

Organisation

Position/s

Course	Provider and/or Facilitator	Qualification Endorsement	Date

References

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