Getting it right
A series of workforce planning and development resources

Training your workforce
Getting the most out of training and development

Te Pou o te Whakaaro Nui
Getting it right series of resources

This document is one of the Getting it right series of workforce planning and development resources produced by Te Pou o te Whakaaro Nui. The documents in this collection are available from our website, www.tepou.co.nz.

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This guide is also an adaptation of work undertaken by Te Pou o te Whakaaro Nui on factors supporting effective workforce training (see http://www.tepou.co.nz/resources/what-supports-effective-workforce-training/514), which was largely informed by the work of Salas and colleagues (2012).29
Training your workforce

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Introduction

A competent and capable workforce is critical to achieving the New Zealand health strategy’s vision in which all New Zealanders live well, stay well, and get well. The workforce is key to achieving population health gains, and is the most valuable and costly resource within mental health and addiction services.

Effective workforce planning and development has never been more important. The way health services are delivered in the future is expected to change. The workforce needs to be capable of delivering new services, responding to emerging issues and risks, and supporting people to better manage their own care. This will require new ways of thinking about how services are delivered and the knowledge, skills, values and attitudes required of the workforce. A planned, rather than a reactive, approach to workforce development is required to respond to current and future challenges. Training and development is one type of workforce development activity that may be used to achieve this.

Most organisations invest in training and development for their staff. Steps need to be taken to increase the chances this will be applied in practice given a low proportion of training is often used on the job. A strategic approach to training and development that is underpinned by workforce planning will help ensure investments in people are being made in the right areas, for the right people, and in the right ways to yield the right results.

Training and development has a range of benefits for the workforce, services, and people accessing services. In addition to improving workforce knowledge, skills, values and attitudes, well designed training and development activities can also increase role clarity, job satisfaction and performance, workforce retention, and support higher quality care and satisfaction with services.

Effective workforce training and development is a process. This process takes time, effort and dedication to make it successful. The process also demands a range of activities that all support the overall training and development objectives.

The approach to training and development outlined in this guide is illustrated in Figure 1. Key activities for organisations to consider before, during and after training are also outlined on page 18 of this guide.
This guide is one of a series of *Getting it right* tools and resources aimed at supporting better practice in workforce planning and development within mental health and addiction services. It takes a systemic approach to workforce development that goes beyond individual workers, and includes organisational and system level factors that impact on the ability of the workforce to respond effectively and efficiently to mental health and addiction issues. By following the simple steps outlined in this guide, workforce training and development is more likely to be effective and sustainable. Checklists are included to support organisations in getting the most out of training and development, along with links to freely available tools and resources. As a result, organisations will be better placed to strategically plan and develop their workforce for the future.

**Figure 1.** Overview of training and development approach.

Note. T&D = training and development.
Definitions

Training and development

Training supports people to gain the right knowledge, skills, and attitudes needed to undertake specific tasks or jobs effectively.

Development has a longer term focus, and includes learning opportunities that help people grow and prepare for future responsibilities. Development focuses more on general knowledge and attitudes and is less focused on skills.13

Activities that fall under the umbrella of training and development include:

» training
» education
» mentoring, coaching and supervision
» study days
» discussion groups
» site visits
» planning days
» staff retreats
» cross organisational exchanges.

Capacity and capability

Two of the primary aims of workforce development include building the capacity and capability of the workforce.

Capacity is about finding out whether we have the people needed and whether we have enough to deliver services.33

Capability is about finding out whether the workforce has the right knowledge and skills and can apply these to achieve desired outcomes or whether these need to be developed or new people hired.35

Learning organisation

An organisation’s learning culture has an impact on job satisfaction and the use of training and development in practice.8 A learning organisation promotes learning amongst staff, and itself learns from that learning to achieve its goals.

Its values, policies, practices, systems and structures support and accelerate learning for all employees. The learning results in continuous improvement, in areas such as work processes, products and services, the structure and function of individual jobs, teamwork, and effective management practices, to name a few. (Bennett & O’Brien, 1994)30
Approach to training and development

Training and development are more likely to be effective when guided by a strategic workforce planning process. This section describes the workforce planning and development framework illustrated in Figure 2.

Workforce planning

Workforce planning is the systematic identification, analysis and planning of future workforce needs based on population health needs and priorities. The workforce planning process aims to describe the services needed in the future and identify their workforce requirements. The process then compares these findings with information about the current workforce to determine the gaps. The workforce planning process results in the development of a workforce action plan that describes the workforce development activities needed to address those gaps. It helps determine whether training and development is the right thing to do, or whether another workforce development activity is more appropriate.

Workforce development

Workforce development is driven by, and is the output of, workforce planning. Workforce development is the set of activities developed to address specific gaps or risks identified through workforce planning to ensure the workforce is best able to deliver future services. The Ministry of Health has taken a broad and comprehensive approach to workforce development. This approach considers the range of factors which impact on the ability of the workforce to respond efficiently and effectively to mental health and addiction problems. This includes a focus on individuals, as well as the organisations and systems in which they operate.

The five domains of workforce development include:

- Learning and development: coordination and alignment with the needs of services and people accessing services.
- Recruitment and retention: coordination and planning to increase workforce capacity and capability.
- Organisational development: building cultures and systems that will attract and grow workforce to better meet the needs of people accessing services.
- Information, research and evaluation: building evidence to support workforce planning and development.
- Workforce development infrastructure: including sector relationships, co-ordination, collaboration and funding.
Approach to training and development

Figure 2. Workforce planning and development framework.32
### Guiding principles

Workforce planning and development is underpinned by guiding principles as summarised in Table 1.

<table>
<thead>
<tr>
<th>Principle</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>People-centred</strong></td>
<td>Health providers need to have a greater focus on people, understand people’s needs and preferences, and partner with people to design services to meet these.</td>
</tr>
<tr>
<td><strong>Equitable and appropriate</strong></td>
<td>All communities must be able to expect equitable outcomes from services, and have equitable access to services that are provided in the manner most appropriate to their needs.</td>
</tr>
<tr>
<td><strong>Strategic</strong></td>
<td>Workforce planning and development must be strategic in nature, align with the future vision and direction of an organisation and local, regional and national bodies, and, reflect identified priorities, and population issues.</td>
</tr>
<tr>
<td><strong>Stakeholders</strong></td>
<td>Providing opportunities for key stakeholders in the workforce planning and development process, including consumers, frontline workers, managers/supervisors, funders and policy makers, helps ensure greater buy-in and that activities meet the needs of various stakeholders.</td>
</tr>
<tr>
<td><strong>Evidence-informed</strong></td>
<td>Activities and programmes informed by the best available evidence, including research evidence, clinical expertise, and consumer and family perspectives, are more likely to be effective.</td>
</tr>
<tr>
<td><strong>Multi-level</strong></td>
<td>A range of factors are likely to impact on a particular workforce development issue. A comprehensive workforce development programme recognises the complexity of real life work practice and includes interventions at more than one level (eg individual and organisational).</td>
</tr>
<tr>
<td><strong>Whole-of-system</strong></td>
<td>Workforce planning and development that is better integrated across the workforce (clinical and non-clinical), across organisation (finance and services) and across services.</td>
</tr>
<tr>
<td><strong>Sustainable</strong></td>
<td>Workforce development activities often involve a change to policies, procedures or work practices. Sustainable change that is continued in the longer term requires ongoing support and resources. Strategies to ensure sustainability are an important issue to be addressed at the planning stage of any workforce development activity.</td>
</tr>
</tbody>
</table>
| **Ongoing evaluation**        | Regular evaluation of the process and outcomes of workforce development activity can provide:  
  » valuable feedback to participants and stakeholders  
  » opportunities for continuous quality improvement  
  » useful information regarding the most effective strategies (and also what doesn’t work!). |

**Note:** Adapted from Roche & Skinner (2005) and Health Workforce Advisory Committee (2005). Additional sources Salas et al., (2012), Fritzen (2007); Minister of Health (2016).
Training and development process

A four stage process is presented in Figure 3 in order to increase the chances of successful workforce development – including training and development.

1. **Workforce planning**: needs assessment, identify gaps between future workforce required and current workforce, determine priority risks and gaps (for example, *Getting it right* workforce planning approach).

2. **Design**: design workforce development activities with supporting engagement strategies (for example, project management and other activities needed to support implementation).

3. **Implement**: deliver or carry out workforce development activities (for example, implementation and post-implementation activities).

4. **Evaluate**: monitoring and evaluation (for example, have the original objectives been met, if not, why not?).

*Figure 3*. Workforce development (WFD) process.
The first stage in training and development is workforce planning (see Figure 3). Workforce planning or needs assessment involves the collation of key information to identify priority workforce issues and gaps that need addressing through workforce development activities. Workforce planning is a systematic approach which provides an understanding of key strategic goals and objectives that form the basis for determining workforce needs.

The seven steps included in the workforce planning approach described in the Getting it right: Workforce planning guide include:

**Step 1** - Scoping the plan: understanding the strategic environment and developing a shared understanding of the desired outcomes for the planning process

**Step 2** - Visioning future services: identifying the factors influencing the future shape of services and potential future service models and service user pathways

**Step 3** - Understanding future workforce requirements: identifying what the workforce needs to look like to provide future services

**Step 4** - Analysing the current workforce: using current workforce data and trends to estimate what the workforce might look like in the future

**Step 5** - Identifying gaps between the current and future workforce, and prioritising these gaps

**Step 6** - Developing the actions needed to address these priorities, compiling a workforce action plan, and implementing this

**Step 7** - Monitoring and evaluation.

Completing steps one to six results in a workforce action plan which identifies the priority workforce gaps and sets out the activities needed to close those gaps. This process will help in determining whether training and development is the right thing to do. It will also assist in reflecting on several workforce planning and development guiding principles including being people-centred, equitable and appropriate, strategic, and taking a whole of system and evidence-informed approach.

**Review workforce action plan**

An initial step when thinking about training and development is to review your workforce action plan. If you do not have an action plan the Getting it right: Workforce planning guide can assist you with this. Information which may be useful to consider includes strategic plans, organisational goals and objectives, workforce data, staff and service user satisfaction surveys, and service user outcomes. This will help establish what the needs of the organisation are (organisational needs analysis) and ensure any subsequent training and development activities have a strategic alignment with key business objectives and challenges.

During this planning stage consider the readiness and capacity of your organisation to undertake training and development activities (for example, are you thinking about implementing training and development activities, recently done so, been doing it for awhile now, or are you not ready to do this right now?), any barriers to implementation (for example, other priorities, resources, capability, staff motivation), and how these might be addressed.
Establish knowledge, skills, values and attitudes required

The next step is to check whether the knowledge, skills, values and attitudes required of the workforce to achieve desired organisational outcomes have been established. Figure 4 illustrates the different levels of knowledge, skills, values and attitudes required of the workforce. Each organisation will have competencies or capabilities required of all staff regardless of their position (for example, organisational values, teamwork or communication). For mental health and addiction services, *Let’s get real* outlines the core capabilities required for all people working in the sector (see Table 2). In addition, there will be specific expectations associated with different positions within an organisation (for example, professional competencies).

![Figure 4. Knowledge, skills, values and attitudes required of the workforce (adapted from Astho, n.d).](image)

If the knowledge, skills, values and attitudes required of the workforce have not already been established then a job-task analysis is useful. The *Getting it right: Workforce planning guide* can assist with this. A job-task analysis will help identify the key tasks and knowledge, skills and attitudes required to complete the job or task successfully. A review of job descriptions, observations, and performance standards may be useful. Focus groups, surveys, assessments, and key informant interviews may also be beneficial (for a discussion on different approaches see 3, 5, 22, 26). It is useful to complete this step in conjunction with your HR team.

Assess workforce knowledge, skills, values and attitudes

The next step involves assessing each person’s current knowledge, skills, values and attitudes. This is commonly based on individual performance reviews, but may include interviews, questionnaires, surveys, work sampling or feedback on training progress.3

The *Real Skills: Online assessment tool* is also an easy way to review and assess information on your workforce’s knowledge and skills in *Let’s get real* and other sector frameworks. This can assist you in identifying particular areas that might need development. See [http://www.tepou.co.nz/initiatives/tools-to-use-lets-get-real-in-an-organisation/109](http://www.tepou.co.nz/initiatives/tools-to-use-lets-get-real-in-an-organisation/109)
Table 2. Seven Real Skills required of all people working in mental health and addiction services - each skill can be achieved at an essential, practitioner, or leader level

<table>
<thead>
<tr>
<th>Real Skill</th>
<th>Every person working in a mental health and addiction treatment service</th>
</tr>
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<tbody>
<tr>
<td>Working with service users</td>
<td>Uses strategies to engage meaningfully and work in partnership with service users, and focuses on a service user’s strengths to support recovery.</td>
</tr>
<tr>
<td>Working with Māori</td>
<td>Contributes to whānau ora for Māori.</td>
</tr>
<tr>
<td>Working with family and whānau</td>
<td>Encourages and supports families and whānau to participate in the recovery of service users and ensures that families and whānau, including the children of service users, have access to information, education and support.</td>
</tr>
<tr>
<td>Working within communities</td>
<td>Recognises that service users and their families and whānau are part of a wider community.</td>
</tr>
<tr>
<td>Challenging stigma and discrimination</td>
<td>Uses strategies to challenge stigma and discrimination, and provides and promotes a valued place for service users.</td>
</tr>
<tr>
<td>Law, policy and practice</td>
<td>Implements legislation, regulations, standards, codes and policies relevant to their role in a way that supports service users and their families and whānau.</td>
</tr>
<tr>
<td>Professional and personal development</td>
<td>Actively reflects on their work and practice and works in ways that enhance the team to support the recovery of service users.</td>
</tr>
</tbody>
</table>

Source: [https://www.tepou.co.nz/initiatives/real-skills-online-assessment-tool/183](https://www.tepou.co.nz/initiatives/real-skills-online-assessment-tool/183)

Determine which staff need training *

The next step involves determining which staff need training and for what (individual needs assessment).

With limited resources it is important to identify where the largest gaps in knowledge, skills, values and attitudes are then target these areas. Gaps are identified by comparing current capabilities with those identified as necessary or desirable.

Once key gaps that need addressing are identified then appropriate methods can be selected for addressing these. The five domains of workforce development (see Figure 2) include recruitment and retention; organisational development; information, research and evaluation; workforce development infrastructure; and learning and development. These domains support a systems approach to workforce development and consider not only individual employees but also organisational and structural factors that help facilitate change in practice. This stage presents an opportunity to decide whether training and development is the right thing to do.

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*— An analysis may also be undertaken at a team or departmental level. A team needs assessment considers the team related tasks and competencies that may be the focus of team training. This may be for example in response to new service delivery methods.
Key questions to consider at this stage are outlined below.

» Is training likely to be effective in changing practice (for a review of different strategies see for example 4, 11)?

» Are other activities likely to be more effective? For example, is recruitment a better strategy to increase staff capability?

» Do workforce development activities need to be focused on other areas as well to bring about sustainable change? For example, what systems and processes need to change and what encouragement and support do trainees need so that training is effectively used in practice? Strategies which are broad and comprehensive are likely to have the greatest impact. 28

Prioritise training and development

If training and development is the right action to take, then the above workforce planning process helps determine what learning opportunities are required and for whom. Training and development opportunities will need to be prioritised depending on those most critical to the service or organisation. A prioritisation tool can assist with this process (see Figure 5).

Cost benefit analysis

A cost-benefit analysis can help managers and leaders understand the value of investing in training and development.

Questions to consider when prioritising training and development are outlined below.37

» What impact will developing these skills have on our service delivery and people accessing our services?

» What would be the cost/benefit of investing in developing these skills?

» Which skill needs are the most important to our long-term success?

» Which skills are the most urgent?

» What training is mandated (for example, by the Ministry of Health)?

A risk assessment can help identify key areas which need to be focused on, as well as the likely consequences of ignoring some gaps.

![Figure 5. Example prioritisation tool.](image-url)
Cost considerations may include:

» training and development time
» content development time
» training resources, such as materials and workbooks
» delivery method
» loss of time in delivering services
» administration costs
» venue, equipment, travel, and other costs.

Benefits may include:

» increased safety, better outcomes and satisfaction amongst service users
» improved service delivery, including more effective, efficient and responsive services
» implementation of evidence-based practices
» greater team morale
» higher levels of workforce motivation and commitment

Funding for workforce training and development activities should be incorporated within annual budgets and forecasting. It is important that resources required for training are accessed and secured.

Training and development plan

The next step involves documenting your training and development activities into a workforce action plan. The plan should have organisational support and buy-in, and identify:

» key roles and responsibilities
» budget and resource requirements
» timelines, milestones and key deliverables
» how progress will be monitored, such as performance measures and success indicators.

<table>
<thead>
<tr>
<th>Training and development goals</th>
<th>Knowledge, skills, values and attitudes required</th>
<th>Who will participate?</th>
<th>Training and development activities/methods</th>
<th>How will this be evaluated?</th>
<th>Cost</th>
<th>Date</th>
</tr>
</thead>
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</table>

*Figure 6. Sample plan for training and development (adapted from Skills Third Sector).*
### Checklist

Have you identified and documented:

- the strategic environment that is driving your plan? (for example, future demand, changing population health needs)
- knowledge, skills, values and attitudes required of the workforce to achieve organisational goals? (for example, working with Māori, working with service users)
- staff knowledge, skills, values and attitudes? (an assessment of each person's capabilities for example using the Real Skills online assessment tool)
- which staff need training and development and for what? (for example, an assessment of individual needs)
- resources required for training and secured these? (for example, training costs, study leave, and travel costs)
- training and development in your workforce action plan? (for example, goals, who will participate and when).
The design and implementation of training and development activities should take an evidence-informed, multi-level and sustainable approach. This requires considering what happens before, during, and after training. Tips and ideas for organisations to increase the effectiveness or benefits they receive from training and development activities are discussed below and summarised in Table 3.

**Before training** organisations can increase the effectiveness of training and development activities by:

» providing leadership support

» ensuring supervisors have the right information to build staff motivation and confidence

» ensuring training and development activities are scheduled at the right time. 29

There is no doubt that training and development activity will be most successful when it takes place within a “learning organisation”. (NHS, 2003, p. 23) 21

**During training** the effectiveness of training is enhanced by:

» ensuring the content and delivery is well designed and uses appropriate methods

» considering the background, knowledge and experience of trainees

» using technology wisely.

What happens **after training** has been identified as critical to the success of training and development activities. Training failures are largely attributed to what happens at this stage. 17 20 21 The use of strategies that can increase the likelihood of success are therefore required.

Following the implementation of training and development activities, the use of knowledge, skills, values and attitudes in practice can be enhanced by:

» supporting workers to use these in practice

» providing opportunities to practice.

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b—Evidence suggests 70 per cent of training failures are due to what happens after training, 20 per cent due to a lack of preparation before the event, and 10 per cent are due to the training itself.
### Table 3. Practical tips and ideas for supporting effective workforce training

<table>
<thead>
<tr>
<th>Factors</th>
<th>Practical tips and ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workforce planning</td>
<td>» Assess training needs.</td>
</tr>
<tr>
<td></td>
<td>» Develop action plan for staff training.</td>
</tr>
<tr>
<td></td>
<td>» Ensure budgets allow sufficient resources for training.</td>
</tr>
<tr>
<td>Leadership support</td>
<td>» Communicate the value of training to the organisation, including alignment to strategic goals.</td>
</tr>
<tr>
<td></td>
<td>» Consider making key training mandatory.</td>
</tr>
<tr>
<td></td>
<td>» Emphasise training in recruitment processes.</td>
</tr>
<tr>
<td></td>
<td>» Have dedicated quality or training manager positions.</td>
</tr>
<tr>
<td></td>
<td>» Being open to reviewing and improving training processes and procedures.</td>
</tr>
<tr>
<td></td>
<td>» Develop written training and development policies.</td>
</tr>
<tr>
<td>Create a learning climate</td>
<td>» Prepare supervisors, mentors, and leaders with the right information to engage learners and build their motivation and confidence.</td>
</tr>
<tr>
<td></td>
<td>» Provide clear expectations.</td>
</tr>
<tr>
<td></td>
<td>» Provide incentives (for example, acknowledgement or rewards).</td>
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<tr>
<td>Build staff motivation and confidence</td>
<td>» Communicate the value of training to individual roles and the organisation.</td>
</tr>
<tr>
<td></td>
<td>» Consider making training mandatory.</td>
</tr>
<tr>
<td></td>
<td>» Frame learning and development as an opportunity.</td>
</tr>
<tr>
<td></td>
<td>» Communicate the benefits of training - learning and development opportunities need to be perceived as useful, relevant, and responsive to workers’ needs.</td>
</tr>
<tr>
<td></td>
<td>» Assess each person’s strengths and development needs.</td>
</tr>
<tr>
<td></td>
<td>» Create personalised professional development plans.</td>
</tr>
<tr>
<td></td>
<td>» Provide mentoring.</td>
</tr>
</tbody>
</table>

**Step 2 and 3: Design and implement**
<table>
<thead>
<tr>
<th>Factors</th>
<th>Practical tips and ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training content and delivery</td>
<td>» Develop training and development goals that are informed by the workforce planning process and responsive to trainees' needs.</td>
</tr>
<tr>
<td></td>
<td>» Use appropriate instructional and adult learning principles.</td>
</tr>
<tr>
<td></td>
<td>» Include a wide range of examples and teaching methods to accommodate different learning styles and preferences (for example, kinaesthetic, visual and oral).</td>
</tr>
<tr>
<td></td>
<td>» Provide opportunities for information, demonstration, practice and feedback.</td>
</tr>
<tr>
<td></td>
<td>» Use group training sessions to enhance opportunities for discussion and sharing ideas.</td>
</tr>
<tr>
<td></td>
<td>» Build on trainees' existing knowledge and skills to encourage engagement.</td>
</tr>
<tr>
<td></td>
<td>» Use learning materials to support changes in practice.</td>
</tr>
<tr>
<td></td>
<td>» Make training enjoyable and fun!</td>
</tr>
<tr>
<td>Trainees' background, knowledge and experience</td>
<td>» Training content and delivery informed by trainees' background, knowledge and experience.</td>
</tr>
<tr>
<td></td>
<td>» Use simple language to explain key concepts.</td>
</tr>
<tr>
<td></td>
<td>» Tailor training content to suit different cultures.</td>
</tr>
<tr>
<td></td>
<td>» Deliver training in a non-threatening learning environment.</td>
</tr>
<tr>
<td>Wise use of technology</td>
<td>» Use technology to support training delivery and application in practice, for example Skype, online decision support tools, video or tele-conferencing, apps, and online resources and tools.</td>
</tr>
<tr>
<td></td>
<td>» Ensure sufficient infrastructure, such as hardware, software, internet access and technical support.</td>
</tr>
<tr>
<td></td>
<td>» Build trainees and trainers' computer and technology skills if needed.</td>
</tr>
<tr>
<td>Supporting use in practice</td>
<td>» Provide opportunities for trainees to practice new knowledge, skills, values and attitudes in practice, and remove barriers preventing their use.</td>
</tr>
<tr>
<td></td>
<td>» Encourage and reinforce the use of new knowledge, skills, values, and attitudes - for example through mentoring, supervision, or modelling desired behaviour.</td>
</tr>
<tr>
<td></td>
<td>» Remind workers of the philosophies and policies underlying their work.</td>
</tr>
<tr>
<td></td>
<td>» Provide access to relevant learning aids, resources and communities of practice to support the use of training in practice.</td>
</tr>
<tr>
<td>Evaluate training</td>
<td>» Collect formal and informal data to inform the development and delivery of future training.</td>
</tr>
</tbody>
</table>

Adapted from Te Pou (2012).
## Checklist

Have you:

- gained leadership support for training and development activities (for example, training and development policies, training emphasised within recruitment processes, being open to improving processes)?

- provided supervisors with the right information to prepare workers (for example, providing clear expectations, communicating the value and benefits of training, providing incentives)?

- secured adequate resources for training and development activities (for example, training costs, study leave)?

- built staff motivation and confidence (for example, staff see the usefulness and relevance of training for practice)?

- ensured activities are useful, relevant and responsive to learners’ needs (for example, practical and meaningful content)?

- considered how technology is used and what supporting infrastructure is required (for example, appropriate IT infrastructure and support)?

- supported workers to use new knowledge, skills, values and attitudes in practice (for example, coaching, mentoring, opportunities to practice)?
Evaluation should be a key component of training and development activities and is one of the guiding principles for workforce planning and development. Evidence suggests evaluated programmes are likely to be two to three times more effective.¹

An evaluation can assist in:

» making decisions about the future of training or development programmes
» providing feedback to participants, and those who developed and/or delivered the programme
» understanding future budget and resource allocations
» identifying areas for potential improvement
» determining whether the approach was effective or whether another strategy is required.

A widely used model of training evaluation is the Kirkpatrick model.¹ This examines:

» trainee reactions (for example, whether trainees liked the training)
» learning (for example, principles, facts, or skills learned)
» behaviour (for example, changes in behaviour on the job)
» results (tangible outcomes from the training).²²

**Checklist**

Have you:

» developed an evaluation plan prior to implementation of training (for example, intended outcomes, how these will be measured, how often progress will be reviewed)?

» gathered information and data to evaluate training and development activities (for example, feedback from participants, service user satisfaction with services)?

» used evaluation findings to inform the development and delivery of future training (for example, made recommendations about future training, identified what’s working well and areas for improvement)?

» shared evaluation findings with relevant stakeholders (for example, reported findings to trainees, trainers, managers and leaders)?
Summary

The workforce is the most important resource in health services. Workforce development helps support the delivery of quality services that are responsive to consumers. Training and development is one type of workforce development activity which may be undertaken to support this. A strategic approach to training and development that is informed by workforce planning will help ensure investments are more likely to be effective, support the achievement of key strategic goals, and undertaken in priority areas. Well-designed training and development benefits organisations by improving workforce capability, job performance, increasing role clarity and job satisfaction, reducing turnover and improving retention, and supporting higher quality support and satisfaction with services.\textsuperscript{3, 16, 27} The success of any training and development programme depends on how well organisations support this before, during and after implementation (see Table 3). The success of a training programme is illustrated in the following case study. Also attached on page 26 are freely available resources that can support organisations in getting the most out of training and development their workforce.

Table 4. Key questions for managers, leaders, training managers and human resources staff about training and development

<table>
<thead>
<tr>
<th>For training in general throughout the organisation or service</th>
</tr>
</thead>
<tbody>
<tr>
<td>» How is training and development going to support the attainment of strategic goals? For example related to organisational change or future services.</td>
</tr>
<tr>
<td>» Is our organisation investing sufficiently and wisely in training and development? For example, do we have training and development policies and budget for training and development each year?</td>
</tr>
<tr>
<td>» What are our priority areas for training and development? How have these been determined? For example, are we using a systematic workforce planning process such as Getting it right?</td>
</tr>
<tr>
<td>» What knowledge, skills, values and attitudes are required by our workforce to deliver quality services in the future? For example, what competencies and capabilities are required? What gaps exist?</td>
</tr>
<tr>
<td>» How supportive is our organisation in training and developing our employees? For example, how well do we motivate and encourage staff to undertake training? What are we doing to reinforce learning in practice?</td>
</tr>
<tr>
<td>» How have we signalled the importance of training and development to our employees? For example, how do we communicate the value of training to the organisation? Is training mandatory? How well is training and development embedded within our HR processes?</td>
</tr>
<tr>
<td>» How are we evaluating the impact of our training and development activities? What do we expect to see? What difference has training and development made in practice?</td>
</tr>
</tbody>
</table>

Adapted from Salas et al., 2012, p. 94.\textsuperscript{19}
Case study

Step 1. Planning

At a recent workforce planning day, ABC Service decided to focus on building its workforce’s capability for working and engaging with Māori clients effectively. This decision is aligned with the organisation’s key strategic goals and was confirmed as a priority area for the organisation by both management and staff.

ABC Service’s decision was informed by a number of findings made during the planning process.

1. Consumer and service use data (from PRIMHD) showed that a large proportion of people using their service are Māori.

2. Population projections over the next 5 to 10 years indicate that the Māori population in the DHB-locality is likely to increase at a greater rate than other groups.

3. ABC has relatively few Māori employees, with Māori representation on staff being about half that of people using the service.

4. All employees have completed the Real Skills: Online assessment tool. Team results reiterated gaps in the Real Skill Working with Māori for the organisation, along with Working with families and whānau.

The training manager was aware that working with Māori was an essential capability required by all staff working in mental health and addiction services. At an essential level this means developing an understanding of the importance and value of te reo Māori, whakawhanaunga, hauora Māori and manaaki. For example, demonstrating respect for te reo Māori and tikanga, understanding where people come from, Māori models of health and healing practices, and the importance of whānau, identity, engagement and hospitality. For managers this also means providing resources to support staff and effective service systems to help enable Māori aspirations for health and wellbeing.

As all people working in mental health and addiction services need to be capable of working with Māori it was decided that training needed to be made available to all staff. The goal of training initially would be to develop a better understanding of te Tiriti o Waitangi, historical perspectives, Māori worldviews and health beliefs, and to improve pronunciation of te reo Māori.

ABC recognised that in order for training to be effective that managers and leaders would also need to take part in the training and that staff would need encouragement to participate. ABC also intended to update their HR processes to ensure new staff received relevant training as well.

ABC’s training and development plan was updated and a project plan was agreed for implementation of the training.

Step 2. Design

ABC planned to make training mandatory to help communicate the value of the training to staff, which they conveyed at a team meeting and via email as well.

Managers and supervisors were given relevant information about the training so they could help staff understand the benefits of the training, particularly to their clients, and how the training was relevant and practical to their work.

ABC reviewed several training options and selected a Māori training provider with relevant experience and knowledge in delivering workshops to health workers. The trainer adapted their training programme to meet the training goals of ABC.

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c—See http://www.tepou.co.nz/initiatives/lets-get-real/107
Step 3. Implement

A two-day workshop was delivered on site. The workshop was interactive and required participants to reflect on their own experiences and examples from their own work. Role plays and other activities were used to engage trainees. Feedback was also provided to participants along with course materials. At the end of the day, participants identified goals that they would like to work on further.

Once ABC staff had completed the training, learnings were shared at a team meeting, with values-informed practice discussed throughout. The team identified goals that they would like to work on as a group. Progress was then supported through supervision and mentoring sessions. In addition, managers modelled the use of te reo Māori in communication with staff and advised that additional resources and cultural support would be available where needed.

Step 4. Evaluate

After the training, training participants completed a workshop evaluation. Results were compiled and provided to management. These were then shared with employees at a team meeting. Some areas for improvement were identified (for example, adjusting the timing of the workshop so more people could attend training, and increasing the focus on Māori health beliefs). Overall the results indicated that the participants were satisfied with the course, felt more confident in working with Māori clients, and were able to use the training in their daily practice. It was recommended that this training be available to new employees and the course content be adapted to include Māori health beliefs.

In addition, ongoing evaluation was made using consumer feedback from before and after the training to demonstrate the value of the training to inform practice over time.
Tools and resources

Freely available training and development tools and resources that can be used by organisations to support training and development are listed below.

**Workforce planning**

**Workforce planning guides**

- **Getting it right: Workforce planning guide.** A workforce planning guide developed specifically to support workforce planning for New Zealand mental health and addiction services. The planning approach has been adapted from the Six Steps Methodology. [https://www.tepou.co.nz/initiatives/workforce-planning/15](https://www.tepou.co.nz/initiatives/workforce-planning/15)

- **Workforce strategy key elements.** A checklist developed by the State Services Commission. [http://www.ssc.govt.nz/workforcestrategy](http://www.ssc.govt.nz/workforcestrategy)


**Training and development guides**


**Training needs assessment**


- **Let’s get real team planning tool.** A team planning tool based on sound methodology to identify and plan training needs in an organisation in relation to the core competencies for all workers working in mental health and addiction services. [http://www.tepou.co.nz/resources/lets-get-real-team-planning-tool/127](http://www.tepou.co.nz/resources/lets-get-real-team-planning-tool/127)

- **Training and development checklist.** Progress for Providers has developed a tool to assist organisations develop a person-centred approach in the UK context. It provides a structured approach to organisational development that includes a section on workforce development with tools to assess training needs. [https://progressforproviders.org/checklists/checking-your-progress-in-using-person-centred-practices/](https://progressforproviders.org/checklists/checking-your-progress-in-using-person-centred-practices/)

- **Manager’s Guide to Successful Training.** Careerforce have published a booklet that has a brief outline of aspects to consider when developing a training plan for qualifications on the NZQA framework. For a copy phone 0800 277 486 or email info@careerforce.org.nz

- **Training Needs Analysis.** Skills Third Sector in the UK has developed a step by step guide to carrying out a training needs analysis across all levels of an organisation. This guide is specifically designed for people in charities and social enterprises. [https://www.learningcurve.org.uk/courses/ladder4learning/resources/training_needs_analysis](https://www.learningcurve.org.uk/courses/ladder4learning/resources/training_needs_analysis)
Design and implement

Before training


» What is the Importance of Training and Development to the Organization? A brief article on the importance of training and development. http://wiki.answers.com/Q/What_is_the_importance_of_training_and_development_to_the_organization

During training


» A Model for Successful Māori Learners in Workplace Settings. A useful resource to support the learning and development of Māori learners that has relevance for all. https://akoaotearoa.ac.nz/download/ng/file/group-5318/a-model-for-successful-Māori-learners-in-workplace-settings.pdf


Training and development plan


Tools and resources
After training

Coaching and mentoring


Evaluate

» Kirkpatrick Partners’ Website. Provides an overview of the Kirkpatrick model and links to useful evaluation resources. http://www.kirkpatrickpartners.com/


» Evaluation Toolkit. Provides a basic approach and some tools for evaluating workforce development. Although developed for an industrial workforce it could be adapted for the health workforce. http://www.cewd.org/workforce/evaltoolkit.pdf


Training your workforce

Getting it right
A series of workforce planning and development resources

Te Pou o te Whakaaro Nui