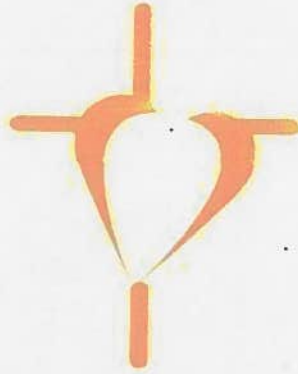


**Daughters of Charity Service**  
**For Persons with Intellectual Disability**



**Education and Training Policy**  
**Training Needs Analysis**

<b>Revision:</b> E	<b>Department:</b> Quality and Risk	<b>No:</b> DOCS 006
<b>Prepared By:</b>	<u>Gráinne Bourke</u> Quality and Risk Officer	<b>Date:</b> 11 <sup>th</sup> February 2014
<b>Approved By:</b>	<u>Denis Cronin</u> CEO: Denis Cronin	<b>Date:</b> 11 February 2014

**Document Review History**

<b>Review Date:</b> February 2014	<b>Reviewed By:</b> Gráinne Bourke	<b>Amendments Required:</b> (Please state section) 4.0, 5.0, 6.0, 7.0, 8.0 Appendices A,B,E,F	<b>New Revision Status:</b>  F
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## **1.0 Purpose of Education and Training Policy**

This framework document provides a systematic step by step approach to the education and training process with supporting documentation. It also facilitates the Training Needs Analysis (TNA) process. Training Needs Analysis is a best practice first step in the systematic approach to training (Reed 2003). This can be used by all managers within the organisation to identify their education and training needs. From an organisational, managerial and individual staff perspective it will ultimately improve service user care as staff competence, skills and knowledge will match the Service needs and delivery.

This systematic approach is one which involves considering the linkages between the parts of the training process. Training must be planned in a cyclical manner and this approach will lead to high quality, planned training (CLMS, Buckley and Caple 1995, Barrington and Reid 1999, Wills, 1998, Bartram and Gibson 1999). Bartram and Gibson (1999) state that a "systematic approach to identifying training needs ensures that people are offered opportunities to learn which are efficient and effective".

## **2.0 Application**

This Policy applies to employees working in the Daughter's of Charity Intellectual Disability Services. From time to time volunteers and/or FÁS employees may access training as deemed appropriate/necessary.

## **3.0 Responsibilities**

It is the responsibility of each manager to implement this policy and each employee to adhere to the policy in a fair and equitable manner.

## **4.0 Function of Daughter's of Charity Education Department(s)**

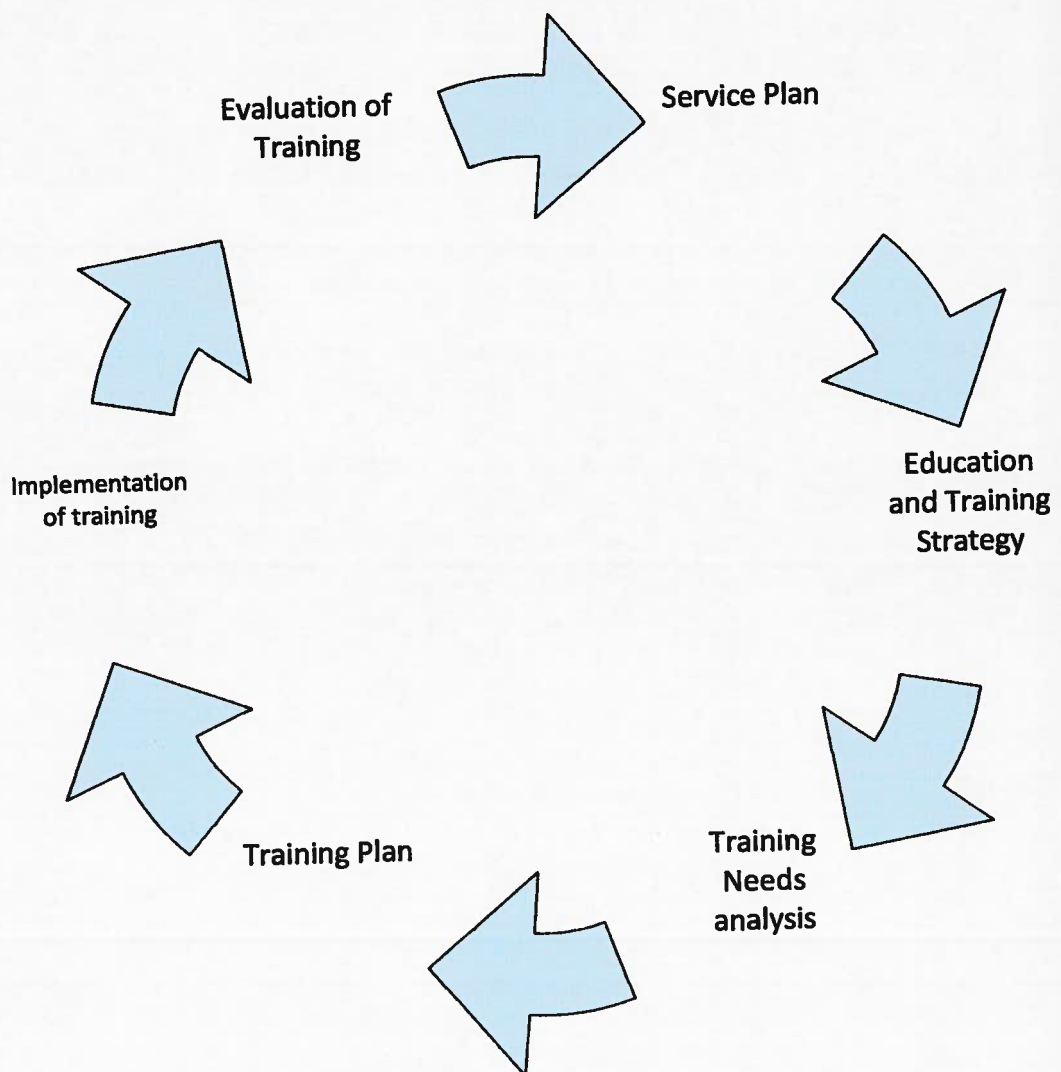
The education function of the Daughters of Charity falls within the remit of the Quality and Risk Officers who report to CEO/ACEO's. Each region has appointed education co-ordinators. The following are the key responsibilities of the Education Departments.

- 4.1 Conduct a Training Needs Analysis every two years throughout the Service through consultation with Directors, Administrators, Directors of Nursing and Clinical Heads of Department (Appendix F).
- 4.2 In consultation with the CEO/Director of Finance develop a yearly training budget; ensure effective monitoring and management of that budget to address training needs identified.

- 4.3 Develop a training plan every two years for all grades to meet Service needs, ensuring effective coordination and delivery.
- 4.4 Identify and source information on external courses and seminars relevant to the Service; source competent trainers to deliver in-house training programme lectures or modules as necessary
- 4.5 Evaluate the effectiveness of training programmes through questionnaires/interviews, observation and modifying training programmes accordingly

## 5.0 Stages in the Education and Training Process

The following is the sequence of steps towards achieving a training system which can meet the needs of the organisation.



All training will be focused on current and future needs of the Service and linked to the Daughters of Charity Service Plan. A comprehensive training needs analysis should be undertaken before any training begins (Appendix G). All training programmes will be evaluated systematically. The training policy within the organisation will be reviewed every two years

### **5.1 Daughters of Charity Service Plan**

The Service Strategic Plan is central to the training needs analysis process. A tool for all Executive/Administrators/Directors of Nursing/Clinical Heads of Department is provided to assist them in identifying their Service priority learning needs (appendix G). This tool lists Service strategic plan objectives. The training needs are identified in an order of merit and a rationale for the provision of the training to support the Service plan objective is given. The target group for specific training are identified and then each training programme is prioritised according to greatest need.

### **5.2 Training Plan**

For a training and development plan to be effective, there must be a clear link to the Service plan and the identified training needs.

### **5.3 Implementation of Training**

- 5.3.1 This policy covers internal and external training courses and supports a process whereby staff can apply for study/exam leave for third level courses through their Executive/Administrator/Director of Nursing/Clinical Heads of Department.
- 5.3.2 Approval for all training rests with the Quality and Risk Officer.
- 5.3.3 Day-to-day planning, co-ordinating and implementing of all training rests with the Education Co-ordinator who reports to the Quality and Risk Officer. This includes planning and organising the In-Service Education calendar, seeking expressions of interest for courses, making course bookings, confirming attendances to intending participants and ensuring that signed records of attendances are maintained.
- 5.3.4 The Education Co-ordinator will register attendances/non attendances and record training onto the HR System.

5.3.5 The original copy of all training registers is retained by the Education Co-ordinator in line with DOCS050 Records Management Policy and Guidelines.

5.3.6. Executive/Directors of Nursing/Administrators/Clinical Heads of Departments and managers have specific responsibility for ensuring staff attend mandatory training from the In-Service education programme.

#### **5.4 Evaluation of Training**

5.4.1 The Education Coordinator with relevant trainers will evaluate training.

5.4.2 Based on this feedback, future training needs can be established in a systematic and planned way as well as recording the successes attributable to the training process.

### **6.0 Training Guidelines**

Training provided is through two strands-In Service Education and External Training events.

#### **6.1 In Service Education (See Appendix E)**

6.1.1 In-Service Education is the first priority of the Education Department as it reflects the current Service plan. A range of courses are on-going in the mandatory area of Health and Safety, together with courses supporting key Services Policies and Procedures such as Core Values, Problem/Challenging Behaviour, Service User Protection and Welfare and HR Policies.

6.1.2 These courses are planned and organised by the Education Co-ordinator in consultation with the Service Executive, Administrators, Director of Nursing and Clinical Heads of Departments.

6.1.3 Education events specific to an individual Service location or department require the prior approval of the Quality and Risk Officer and must be planned so as to minimise disruption to service provision and to avoid the drain on resources that results when several events are running simultaneously. When approved, such courses are arranged in conjunction with the Education Co-ordinator as part of the In-Service Education calendar.

6.1.4 Records of all local training must be maintained centrally by the Human Resource Department and should include the original attendance register and other key factual information such as date, duration and a copy of what was presented during the session.

## **6.2 Guidance for attendance at In-Service Course**

6.2.1 A calendar of events is prepared annually covering the academic period September to June.

6.2.2 Courses on the calendar reflect the priorities identified in the Service plan.

6.2.3 Dates and details of forthcoming courses are circulated regularly to Executive/Administrators/Director of Nursing /Clinical Heads of Department and nominations sought from each Service location.

6.2.4 Staff members are encouraged to liaise regularly with their manager to ensure that they attend all In-Service courses relevant to their current role.

## **6.3 External Training Events.**

6.3.1 Approval to attend an external training course, regardless of whether there are fees to be paid or whether it is a sponsored event, must be sought in advance.

6.3.2 The sole responsibility for making external course bookings rests with the Education Co-ordinator.

6.3.3 In the event of an application being received where a place is reserved by the staff member in advance, the application will not be considered for funding nor will the staff member be given the time off to attend.

6.3.4 Where the total amount of attendance at any training/courses, attended in one calendar year inclusive of registration fees, accommodation and travel costs, paid by the Service on behalf of any employee, amounts to €500 or more, the employee will be required to sign a Service Agreement Form (See Section 9 for greater detail).



## **6.4 Guidance for attendance for External Courses (See Appendix E)**

- 6.4.1 Applications for external training courses must be relevant to present area of work.**
- 6.4.2 Applications for external training courses must be recommended by the Executive/Administrators/Director of Nursing/Clinical Heads of Department and approved by the Quality and Risk Officer.**
- 6.4.3 All requests for approval must be made on Appendix A.**
- 6.4.4 Relevant course documentation in support of the application must be attached so that an informed decision can be made. See checklist on Appendix A.**
- 6.4.5 Following approval, course bookings are made by the Education Co-ordinator who will liaise with the intending participant on all administrative detail.**
- 6.4.5 No provisional reservation is to be made by individual staff members. In cases where a provisional reservation is made, the staff member will be responsible for all fees associated with attendance and must attend in their own time.**
- 6.4.6 There is no provision for retrospective sanction of courses attended without prior authorisation.**
- 6.4.7 Where overnight accommodation is required, it is the responsibility of the individual to make the necessary reservation on receipt of approval. This should be the most economic accommodation.**
- 6.4.8 Travel expenses, mileage or public transport, will be reimbursed in accordance with the reduced motor travel rates outlined in the Department of Finance guidelines. Please note mileage is paid at "conference rate".**
- 6.4.9 If there is more than one person attending the same course car pooling is encouraged.**
- 6.4.10 Receipts for authorised travel and expenses should be forwarded to the Education Co-ordinator for reimbursement immediately following attendance at the event.**
- 6.4.11 Participants are required to complete a written evaluation on completion of the course and have it signed by the**



Executive/Administrator/Director of Nursing/Clinical Heads of Department (See Appendix D).

6.4.12 Participants will on their return brief the members of the department and such other persons to whom the information may be deemed necessary. Such briefings may be either by way of presentation or written hand-out to the main body of staff in the relevant department. However, in order that all staff members who work shifts or may be on annual leave/job sharing, a copy of the presentation must be made available in order for staff to be kept up to date with relevant information.

## **6.5 Guidance for applying for study leave**

6.5.1 Applications should be submitted on Appendix C.

6.5.2 A maximum of 5 days study/exam leave may be granted annually dependant on current resources.

6.5.3 Study/exam leave is calculated on a pro-rata basis on a 5/7 working week.

## **7.0 Staffing Issues**

7.1. It must be recognised that in facilitating staff attendance at training and development programmes, additional burdens may fall on staff colleagues. Participants in such programmes should be aware of this and have regard to the commitments made by fellow workers and be similarly committed to colleagues when the circumstances so require. Further in the facilitation of training and development activities, the Service delivery to Service User's must at all times be considered and balanced appropriately. Attendance at training events must be balanced against the financial and human resources necessary to staff the relevant department. In these circumstances it will be normal practise that not more that two selected representatives will attend the training.

7.2 Management recognise that there are particular difficulties associated with the attendance at training courses of night staff and in these situations, every effort will be made to address this on a case by case basis as it is not possible to provide for every situation in the guidelines contained in this policy document. Compliance with the above guidelines throughout the Service is required in order to apply standard criteria and to maximise the use of available resources in line with the needs of the Service.

## **8.0 Service Agreement**

- 8.1. Where that Daughters of Charity Service supports a staff member for courses of substantial financial amounts in excess of €500 an individual service agreement (Appendix B) will be entered into between the staff member, their line manager and the Quality and Risk Officer.
- 8.2 The Service Agreement form will clearly outline that, in the event of resignation from the Service, there will be a strict requirement for the employee to repay registration fees, accommodation and travel costs on the following scale:
- Resignation in less than 1 year – 100%
  - Between 1 and 2 years – 66%
  - Between 2 – 3 years – 33%

Any sums due can be deducted from final remuneration.

- 8.3 This Service Agreement Form must be completed and submitted, duly signed as required, as part of the established process of obtaining approval to attend an external course.

## **9.0 Funding Guidelines**

- 9.1 The central training budget is the responsibility of the Quality and Risk Officers and shall cover:
- Training programmes organised internally by the Educational Department of the Service which include statutory/mandatory training and others related to the Service Plan.
  - Training outlined in Training Needs Analysis.
- 9.2 Funding will be allocated to each Service Location from the central education and training budget for training organised in conjunction with the Administrator/Manager following a two yearly training needs analysis taking into consideration the relevant statutory training needs.
- 9.3 Funding authorisation will be undertaken by the Quality and Risk Officers.

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## **11. APPENDICES**

<b>Appendix A</b>	<b>Application Form to attend an external course</b>
<b>Appendix B</b>	<b>Service Agreement Form</b>
<b>Appendix C</b>	<b>Application for Study Leave for Third Level Courses</b>
<b>Appendix D</b>	<b>Course Evaluation Form</b>
<b>Appendix E</b>	<b>Support and Conditions</b>
<b>Appendix F</b>	<b>Training Needs Analysis</b>
<b>Appendix G</b>	<b>Service Plan Objectives/Priorities Analysis of Training Needs Analysis</b>

**Appendix A - Application to attend  
External Course/Conference/Seminar  
Daughters of Charity Service**



Name of Applicant:		Service Location:	Unit/Department
Employment Status:	Temporary <input type="checkbox"/>	Permanent <input type="checkbox"/>	Job-Share <input type="checkbox"/>
Course Title:			
Organisers: <i>Please include full contact details: Name, Address, Phone Number, Email.</i>			
Venue:			
Course Dates:		Course Registration Fees: €	
Accommodation: €	Travel: €	Other: €	
<p><b>In all cases where the total financial support will be in excess of €500 (this includes registration fees, travel and accommodation costs), there is a requirement to complete a Service Agreement Form indicating your willingness to continue working with the Daughters of Charity Service for a period of 3 years following attendance or otherwise repay the costs of attendance on a sliding scale. See Section 8 of Education and Training Policy and Appendix B.</b></p>			
Relevance of this course to your work:			
Benefit to the Service: <i>Please attach details of the course contents</i>			
Are you requesting time to attend outside of your normal working hours or rostered hours.		Yes <input type="checkbox"/>	No <input type="checkbox"/>
		If Yes: How many days: _____	
<p>Apart from your written evaluation on the course attended, how do you propose to give feedback to both the Service and your colleagues on your learning from this course:</p> <p>a. Journal Club Meeting <input type="checkbox"/>    b. Locally organised educational forum <input type="checkbox"/>    c. Specially organised Service wide forum <input type="checkbox"/></p>			

I wish to apply for approval to attend the above course and confirm that I have not contacted the course organisers directly. I agree to complete a course evaluation form and give feedback as outlined above.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Applicant**

**Checklist of things you need to do prior to submitting this application for approval**  
**Have you?**

<b>Obtained necessary authorisations overleaf</b>	
<b>Completed and attached a course booking form, with your personal details, which will be sent to the organisers when the booking is being made</b>	
<b>Given your workshop preferences, where appropriate</b>	
<b>Attached a copy of the course content</b>	
<b>Provided contact details of the course organisers</b>	
<b>Outlined costs of registration, travel and accommodation</b>	
<b>Attached a signed Service Agreement Form for amounts in excess of €500 if appropriate</b>	
<b>Outlined how you are going to give feedback</b>	

Recommended by:  
Signature: \_\_\_\_\_

*Line Manager*

Date: \_\_\_\_\_

Recommended by:  
Signature: \_\_\_\_\_

*Administrator/Departmental Head*

Date: \_\_\_\_\_

Approved by: \_\_\_\_\_

*Quality and Risk Officer*

Date: \_\_\_\_\_

Approved for

- Registration Fees
- Travel
- Accommodation
- Time in Lieu

Funding is not granted:

Reason:

- Not Recommended
- Not Approved



**Appendix B - Service Agreement  
Daughters of Charity Service  
Agreement Form**



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I, \_\_\_\_\_, hereby apply for funding and time to attend \_\_\_\_\_.

As the total amount of financial support will be in excess of €500, I agree to commit to working within the Daughters of Charity Service for a period of 3 years following the last date of training. In the event of my ceasing employment within this timeframe, I am liable to refund the costs on the following scale:-

Resignation in less than 1 year	100%
Between 1 and 2 years	66%
Between 2 and 3 years	33%

**DEDUCTION FROM WAGES**

I hereby confirm that I authorise the Daughters of Charity to deduct from my remuneration any sums due from me to the Service including, without limitation, any overpayments, loans, advances or payments made on your behalf.

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**To be completed as part of course approval documentation**

Course Date(s): \_\_\_\_\_

Amount paid by Service: \_\_\_\_\_  
(Including registration fees, accommodation and travel)

Amount of time required: \_\_\_\_\_  
(Days/Hours)

Signed: \_\_\_\_\_  
*Applicant*

Date: \_\_\_\_\_

Signed: \_\_\_\_\_  
*Administrator/Department Head*

Date: \_\_\_\_\_

Signed: \_\_\_\_\_  
*Quality and Risk Officer*

Date: \_\_\_\_\_

## Appendix C - Application for Study Leave for Third Level Course Daughters of Charity Service



### TO BE COMPLETED IN BLOCK CAPITALS

<b>Name of Applicant:</b>		<b>Service Location:</b>	<b>Unit/Department</b>
<b>Employment Status:</b> Temporary <input type="checkbox"/> Permanent <input type="checkbox"/> Job-Share <input type="checkbox"/> Hours Worked per week: _____			
<b>Course Title:</b>			
<b>Qualification Awarded on Completion:</b>		<b>University/College:</b>	
<b>Course Duration (years)</b>	<b>Start Date (month and year)</b>	<b>Finish Date (month and year)</b>	
<b>Relevance of this course to your work:</b>			
<b>Relevance of this course to your professional development:</b>			

I wish to apply for \_\_\_\_\_ day's study/exam leave in support of the above course and agree to the following conditions:-

On completion of the course in \_\_\_\_\_, I will forward a copy of the certification documentation

please insert date

I receive to the Education Department.

I will notify the Education Department in writing if I discontinue this course of study.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Applicant

Recommended by: \_\_\_\_\_ Date: \_\_\_\_\_  
Line Manager

Recommended by: \_\_\_\_\_ Date: \_\_\_\_\_  
Administrator/Departmental Head

Approved by: \_\_\_\_\_ Date: \_\_\_\_\_  
Quality and Risk Officer

## APPENDIX D - Course Evaluation Form Daughters of Charity Service



### TO BE COMPLETED IN BLOCK CAPITALS

Name of Applicant:	Service Location:	Unit/Department
Course Title:		
Topics covered:-		
How did the course meet your expectations?		
In what ways can you make use of the information and skills attained in your day-to-day work?		
Would you recommend this course to your colleagues Yes <input type="checkbox"/> No <input type="checkbox"/>		
Date on which you will provide feedback to your colleagues:		
Any other comments you would like to make:		

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
*Course Participant*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*Line Manager/Unit Head*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*Administrator/Departmental Head*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*Quality and Risk Officer*

**Appendix E  
Support and Conditions**

<b>Training Type</b>	<b>Time Off</b>	<b>Service Cost Conditions</b>	<b>Recommendation Required</b>	<b>Authorisation Required from Education Department</b>	<b>Service Agreement Required</b>
Service Designated Training	Yes	100%	Administrator and/or Head of Department	Yes	Yes
Service related – Staff member's own initiative	Yes	100%	Administrator and/or Head of Department	Yes	Yes
Continuing Professional Development - Staff member's own initiative	Maximum 5 days per academic year (service permitting)	Nil	Administrator and/or Head of Department	Yes	No
Professional Development – Nursing Fees Initiative	Maximum 5 days per academic year (service permitting)	100% through HSE Nursing and Midwifery Planning Development Units	Administrator and/or Head of Department	Yes	Yes

## Daughters of Charity Service Training Needs Analysis



### 1.0 Introduction

Training needs analysis is considered to be the foundation of all training activities. In order to deliver appropriate, effective training which meets the needs of individuals and the organisation and represents value for money a training needs analysis is essential (Boydell and Leary 1996, Reid and Barrington 1999). There is general agreement in the literature that a training needs analysis is a best practice first step in the systematic approach to training (Wills 1998, Boydell and Leary 1996, Reid and Barrington 1999, Garavan et al., 1995, Bartram and Gibson 1997, 1999, Reay 1994).

### 2.0 Training and Development Needs Analysis

The fundamental principles governing every Training Needs Analysis are:

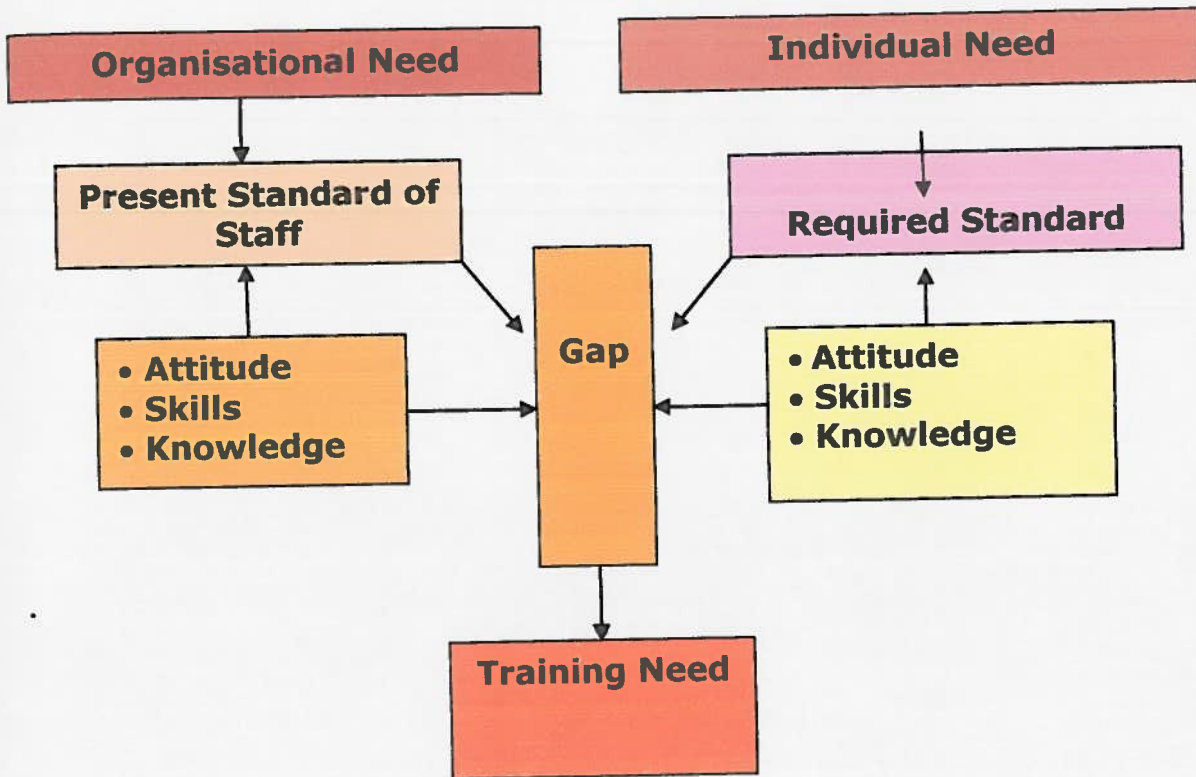
- Evaluating what we are doing now
- Comparing this to what we aim to do in the future
- Analysis of the reasons for the performance gap
- Identifying the types of training interventions, which might bridge the gap

Training needs can be viewed on two levels:

- Organisational Needs
- Individual Needs

A training need is usually viewed as the gap between where the person or organisation is now and where they want to be. This is usually viewed on three distinct levels:

- A knowledge gap
- Skills gap
- An attitudinal gap



### 3.0 Prioritisation of Education/Training Needs

In determining training needs please prioritise training needs on a two year cycle: Cycle 1- September 2013 to July 2014 (Short Term) and Cycle 2 September 2013 to June 2015 (Long Term) based on the departmental training needs taking into consideration the above diagram.



**Appendix G: Service Plan Objectives/Priorities Training Needs Analysis**

**Aim:** This tool may be used by all Executive/Administrators/ Directors of Nursing/Clinical Heads of Department/Managers to assist them in identifying their organisation's priority learning needs (Excluding mandatory internal courses offered by the Service).

Service Plan Objectives	Strategic Documents	Educational/Training Needs	Rationale	Target Group	Priority Ranking
Objective 1					
Objective 2					
Objective 3					