



Policy / Procedure Details	Title:	Staff Development Through Training	
	Type:	ETD	
	Code:	3A.7	
Original Version Details	Date Released:	24/02/1997	
Previous Version(s) Details	Date/s Released:	29/03/2004	15/11/2013
Current Version Details	Written By:	Tom Hughes , Head of Evaluation & Training Department Joan Murray , Evaluation & Training Dept.	
	Reviewed By:	Leadership Team	
	Approved By:	Executive Director	
	Date Released:	20 / 01 / 2017	
	Monitoring Process:	Procedural Review Process	
	Date Due for Review:	20 / 01 / 2020	

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Policy and Procedure Feedback Form

A Policy and Procedure Feedback Form is available on the Western Care Association Intranet (under Procedures) which will provide an opportunity to comment on any policy/procedure.

Your comments will be forwarded to the person who has the lead for the on-going development of the policy/procedure.

All comments will be collated by the person responsible and will inform the three-yearly review cycle for updating procedures.

1. Introduction

What is Development

Development is often thought of as a process of acquisition; of getting training, of getting new skills, of having more of something. This traditional view sees development as something the person gets. It becomes defined as the acquisition of a series of inputs, tools, techniques and competencies. A little further down the same road lies the assumption that the more you get the more you develop.

In fact, development may be about letting go of things rather than getting more. Development is often about letting go of habits, assumptions, limiting beliefs about others, our own fears. It is essentially about opening ourselves to becoming more than we are. It is as much about developing qualities and character as it is about acquiring techniques. Techniques may be important and indeed essential but they have great limitations and also dangers if they are not informed by the right values and personal qualities in action.

The essential nature of development is it's not about getting more; it is about becoming the best we can be.

In this view, development is not a one-way street in which inputs are provided to people who become 'better' the more they get. People have to take responsibility for their own growth and development too. Development is an 'inside job'. Real change comes from within. It can be helped in a variety of ways but at the deepest level, we are responsible for our own development.

We may have experienced people who rely on position rather than contribution as a source of authority or are preoccupied with their own interests to the detriment of our common good as citizens. When this happens, we usually experience a poor service.

Our Mission, our reason for existing as an organisation, is to provide family/person centred services. Family and person centred services are about being of service to the other person, i.e. an 'other' centred service. It is what we ourselves would want to experience if we had to rely on services for ourselves or for a loved one. We have probably all faced, at some stage, in some walk of life, an interaction that suggested the person on the other end was more interested in their convenience than our welfare. We know very quickly that this is not an 'other' centred service.

Development is about helping us to become more than we are. It is about helping us develop awareness of our own assumptions and beliefs, our insights as well as our blind spots, those things that drive our behaviour and practice, whether it is helpful or needs to be reconsidered. Development requires reflection on our own practice and demands that we remain open to our need to change in order to grow. Development is also about helping us find our courage when it is called for. It is about being able to have difficult and important conversations we might prefer to avoid. It is about being open to the possibilities of growth by giving away beliefs and assumptions that are closed and limiting.

It is about the courage to be honest with ourselves and with each other. It can mean the courage to say 'I don't know' so long as that means remaining in solidarity in finding a solution rather than an excuse for abandoning the person.

If development is understood in this way, the acquisition of tools and techniques and of skills and knowledge have a proper foundation.

This description of development applies to all staff in the organisation whether they are supporting people and families directly through frontline services or indirectly through organisation support functions. Staff in organisation functions such as HR, Finance, Admin, IT and ETD all have to locate this concept of development in their support to the overall aims of the organisation. They need to understand their contribution as supporting the 'internal' customers who are typically staff or volunteers. Being 'other centred' does not limit itself to direct support. It is a core value that applies to all staff.

A Useful Way to Think About Learning and Development

There is a well-established rule of thumb in the Learning and Development community that is known as the rule of 70:20:10 (McCall, Lombardo and Eichinger). This states that approximately 70% of all learning and development takes place on the job, 20% comes from various forms of feedback such as mentoring, coaching, and being supported to reflect on our practice including challenging conversations and receiving positive affirmation, and it is estimated that only 10% of learning and development comes from formal training and education. While these ratios are not intended to be rigid and can vary according to circumstance, as a general rule they have withstood the test of time.

How do we Support Learning and Development

We have a range of opportunities to help people to develop. A major but often overlooked part of this includes the informal opportunities that arise in our regular interactions where we can model and encourage good practice in conversation and action. We can challenge each other to hold to our promises, values and ethics. We can show leadership at any level by demonstrating proper values in action, particularly in the face of adversity. We can provide feedback to each other about things we do well and things we could do better during our informal everyday interactions.

One of the most powerful ways to develop people is through our own example. Most people have the experience of being inspired by someone who offered leadership of a type they valued. Inspiration and example are potentially great sources of development for people. This is not simply about the formal authority of role-based leadership, i.e. the manager/staff relationship; it is about what helps us to grow in service to the other. At times, the staff may provide development to the manager. Likewise, the inexperienced staff may offer insights more experienced staff can learn from. We need to be open to learning and growth wherever it comes from. Positive learning and growth never come from the mere exercise of power.

We have formal structures such as line management relationships that provide opportunities to engage in development activity. There are also formal processes such as Support and Supervision which are intended to offer time set aside for development. This may involve supporting a person to develop a solution to a problem that needs to be resolved. It could be a personal issue at work or outside of

work. It could be a task that is challenging or a relationship that has become difficult. Supporting people to develop solutions is a powerful means of building their confidence and capability so that they learn not just how to overcome one particular difficulty but they learn the confidence that they can overcome other difficult situations that arise.

Sometimes we don't easily reach solutions. Being able to support the person through uncertain times, showing the solidarity to stand by them, holding to a high standard in difficult times, having the commitment and determination to find a way forward, offers real opportunity for development.

The Role of Training in Development

Development has many facets some of which have been elaborated on above. These include leadership by example, demonstrating and modelling good practice, setting clear expectations, providing feedback in informal and formal situations, coaching, mentoring, facilitating and *training*.

Understanding the role that training plays in staff development is important for managers and staff. Often it is proposed as a solution to a particular problem in which a staff member or a group of staff appear to be struggling to address. Sometimes training is an essential part of supporting learning, development and change. Sometimes training is proposed as a solution to the wrong problem. Sometimes training is used as a way to avoid having a difficult conversation. *That is an example of a lost opportunity for development.*

The key is to clearly define the issue to be addressed. If it is a relationship issue that is not being acknowledged, then a skills based training event will not address the fundamental problem to be addressed here. Problem definition is essential in understanding what needs to change. Once you have a good grasp of the problem to be addressed, then you can decide what role, *if any*, training will play in resolving the situation.

Training on its own is a 'weak force'. It does not bring about change in isolation. Remember, it typically accounts for only 10% of learning and development. It needs to be accompanied by a range of strategies that focus on why training is needed, what expectation there is on the person following the training and what preparation or planning they have done before the training so they can apply the learning. The more significant the expectation of change, the more of a challenge it will be in putting new learning into practice and therefore the more preparation is required.

In summary then, the essential questions to be considered are therefore:

1. What is the nature of the problem to be addressed
2. What are the desired staff behaviours that would be in place if this problem was addressed
3. What will bring about those desired behaviours?

Characteristics of Different Types of Training:

- **Developing Competencies for Prevention and Responding, Managing Situations and Conditions**

Some training courses are designed to prepare staff to prevent a situation arising and/or how to manage it if it does. Others are designed to make them aware of how to support people with certain health conditions.

Some examples of this type of training include Managing Challenging Behaviour, Fire, Adult Safeguarding / Child Protection, Minimal Handling and First Aid, Supporting Persons with Epilepsy, Responsible and Safe Administration of Medication or Feeding, Eating, Drinking and Swallowing Training (FEDS). These are part of the Basic Skills or Health and Wellness training programme. Keeping the awareness and the skills alive will depend on the nature of the training and the frequency and the context in which it is practised.

The frequency with which skills are used vary as a function of the nature of the training and the characteristics of the service. For example, Fire training is rarely used in a reaction to a real fire because of all the other preventative measures we take including training. However, fire drills are regularly undertaken. This is a good example of engineering an opportunity to practice a response for low frequency situations. We maintain awareness and skills by rehearsal.

Administering Medication on the other hand is a daily event so the level of practice that staff experience on the job is very high and is a regular part of their work. It is a lot easier to consolidate learning from training when there is a constant requirement to practise what has been learned. It does not mean that errors do not occur or that familiarity can present its own problems such as complacency. We maintain our standards by disciplined practice, oversight, audit and feedback.

In some places, people may have behaviours that ask a lot of questions of the service and staff will be very practiced in applying a low arousal approach. Therefore, the training is frequently applied and remains a regular feature of staff practice. Staff will, however, usually need to be guided by a planning process that is informed by the values and skills they have learned on the training. For managing behaviours of concern, a Behaviour Support/Stress Management Plan may be required to guide staff actions. In this example, the procedure supports the practice that has been developed in training. Procedure, training and practice should be aligned.

Safeguarding issues may arise less frequently but staff need to be fully alert and aware of how to recognise it and how to respond to it. Procedures and training can be reinforced by discussions at team level or in various other arrangements such as Support and Supervision meetings.

- **Developing Competencies for Skills Building**

Other types of training such as Training in Systematic Instruction (T.S.I.) or training in a Communication Approach are more about the development of

skills for the people we support. The staff member is the *mediator* of the skill. Their role is to strengthen the capacity of the person to do things that are important to them. This type of training requires more preparation and planning than Basic Skills training by and large.

The preparation may begin with trying to understand what kind of support a person needs and matching the training to the person. If a person needs support to learn how to do some task they find difficult, then using the “Try Another Way” method of T.S.I. might be appropriate to the person. This will need an Individual Training Plan for the person so that the manager agrees with the staff how they will be facilitated to implement the training in practise when they have completed the training event. This type of training requires more planning and preparation before the training commences so that there is a plan to implement the learning and pass on the skills.

- **Developing Alternative Models and Practice**

Other types of training focus on the ‘Why’ questions. In other words, they ask us to reflect on our values, beliefs and assumptions about people. These do not offer skills or techniques but provide deeper insights as to the purpose of our practice and help us challenge what we believe and how we behave. A good example of this is the type of seminar that David Pitonyak offers such as “The Importance of Relationships” or the programme delivered by Hope Dittmeier on Social Role Valorisation.

Other training will help us look at ‘How’ questions. If we believe in family/person centred values and practices, then how would we organise our supports and services?

These events offer examples of ways to provide support differently and help us to develop a broader range of support options. Many service innovations such as individualised living arrangements have been supported by training of this nature.

- **Integrated Foundations; Policy, Training, Practice, Multi-Disciplinary Team (MDT) Support and Management**

Training is actually the easier part of the process. It’s just a matter of supplying it. Learning how to apply training in the workplace is the difficult part. Managers have to support staff to do this and staff must be responsible for their commitment to implement what they have learned.

Training can support learning and development when it is part of a wider strategy. If training is used in isolation, the learning from a training event often weakens rapidly and fails to become established as practice. New concepts and skills are rapidly lost if they are not regularly practiced.

Policy and procedure can be a helpful foundation for applying some types of training in practice. Many Basic Skills training events are underwritten by a procedure that can support the implementation of the training in the workplace.

Support from other services such as BSS, SLT, Psychology, Social Work, OT, etc. may be part of the overall approach and it is essential that their practice is consistent with the content of what staff learn in training and is aligned to the policies and procedures.

Policy and procedure, staff training, MDT practice and management approaches need to be mutually supportive. When any element of this is not working together, it will have a negative impact on what can be achieved. *The glue that holds all of these parts together are the extent to which there are shared values applied in practice.*

2. Creating the Staff Training Plan - Training Needs Analysis

The first step in forming a useful plan of Staff Training requires that we know the *needs of the people supported and families* and the type of knowledge, awareness, skill or expertise *they require from us*. In assessing the *knowledge, awareness, skill or expertise* that is required of us by those using the service, we will identify areas where we have further training needs.

Some staff teams provide organisation support functions and do not always have a direct link with the people and families using Association services. They need to understand the needs of the people they are there to support. Most often this will be staff. Staff are the ‘internal customer’ for support services such as Finance, HR, ETD, IT, Admin, etc. The same principles apply. Knowing what staff require in order to better support those who directly use the service becomes an essential part of informing the action plans for organisational support functions. Such action plans can include training. This can mean the function needs to have its own staff trained in a specific technology such as database management in order to deliver what is required. It may mean the staff of the support function provide training to frontline staff in particular areas such as recruitment, IT skills, etc.

Managers will know the characteristics of the people they support and will be in a position to identify particular areas that may be important for staff practice. This will include items such as:

- The health profile of people – i.e. if they suffer from particular conditions such as Epilepsy or Diabetes
- If they require medical supports for using Oxygen or Peg Feeding
- If they have Behaviours of Concern/ frequent Incidents
- If they are subject to Restrictive Practices
- If there are particular Handling issues associated with their care

Managers will also know the general profile of people supported and additional needs and preferences identified through Individual Planning which may have a training implication beyond Assurance Level topics. They may require support to learn new skills to enhance their independence such as cooking, dressing, personal hygiene, road safety, money management, menu planning, shopping, etc. Communication skills or technologies may be needed to support the person’s development. This may include specific methods such as LAMH, PECS or the use of Assistive Technologies ranging

from low tech flash cards to high tech tablets or smart phones. People may also have particular characteristics associated with a specific diagnosis such as Autism that require an Autism-informed approach. Bespoke training around individuals with a diagnosis of Dementia may also be required.

Connections to communities may be a priority for individuals and there may be important aspects of this that can be supported by training. However, it is equally important that training is not considered a *prerequisite* for exploring how to connect people with their communities and how to support them to attain valued social roles. Many staff are very skilful in connecting people in communities already. It would be a mistake to risk disempowering staff who may be instinctively good at this. That would be an example of training being put forward as the *wrong solution*. Not only is it unnecessary, it may prevent people from using their initiative and inhibit their successful use of intuition.

Basic Skills and Health and Wellness Training Reports provide managers with information of the coverage levels across the range of topics addressed by this. It includes information on the general Basic Assurances and Health and Wellness programme and also more specialised and bespoke events. This information can also be accessed by managers at any time. If there is slippage in the level of cover for Basic Skills or Health and Wellness that have particular importance to that service, the manager needs to address this. If there are emerging issues which relate to Basic Skills or Health and Wellness but require more than the training provided, the manager can seek a more tailored training. Enhancement Level training data is also available to managers. This allows them to review the type of training their team members have and to consider whether there are areas of critical importance where there are gaps.

A Training Needs Analysis for managers in direct service provision is essentially comprised of the information outlined above. In summary, this asks what are the characteristics of the people supported in relation to:

1. Health specific conditions, such as diabetes, epilepsy, peg feeding, etc.
Consider also if there are ongoing behaviours of concern or special requirements with moving and handling
2. Needs and priorities of people in areas for enhancing their Independence (Enhancement Training)
3. Skills within the staff team (Basic Skills / Health and Wellness and Enhancement Training Reports)
4. Skills required by staff to address gaps in their ability to support the people in the service
5. What staff training be useful for in addressing these gaps
6. Priorities for training for the staff team in order to focus on the most important requirements
7. Implementation challenges faced by the staff team in putting training into practice
8. Most effective way to address the implementation challenges.

3. Training organised through the Evaluation & Training Department (ETD)

ETD organises training to support staff in responding to the needs of the people who use Association services. This training can be broken down into 3 main categories:

1. Assurance Training: training in foundation areas such as Health, Safety, Rights, Safeguarding/Protection, Challenging Behaviour, etc., otherwise referred to as *Basic Skills / Health and Wellness*.
2. Enhancement Training: training in areas of more advanced knowledge and skills acquisition in supporting people who use Association services which include training in specific approaches or methods, e.g. PECS, Hanen, ATLASS, T.S.I., etc. Enhancement Training also includes those type of events described above that focus on the 'Why' and 'How' we are organised as a service. This category can involve longitudinal training programmes that take place over months or even a year or more as well as short term one or two day events.
3. Train the Trainers Programmes: many of the training programmes provided by Western Care are delivered by Association staff that have been sponsored to undertake a Train the Trainers programme. These include Manual Handling, Managing Challenging Behaviour (MCB), Personal Outcome Measures, training in Systematic Instruction (T.S.I.), Responsible and Safe Medication Management, FEDS, LAMH, Autism Early Bird, Hanen Communication, Adult Safeguarding / Child Protection, Rights, MEEPS/Midas driver safety training, etc.

4. Assurance Training (Basic Skills / Health and Wellness)

Assurance Training is planned at the start of each year based on targets set by the Leadership Team for skills coverage in *mandatory courses* and maintaining organisational coverage levels set in previous years for *discretionary courses*. The level of cover for discretionary training is determined by the manager of the service based on the profile of need for the people they support. For example, some services may support people who experience particular health conditions.

Assurance Level Training

Basic Skills - Mandatory and Discretionary Courses

Mandatory courses are courses which all staff have to attend, they include:

- Adult Safeguarding / Child Protection
- Minimal Handling (Adult or Child) for staff working in services / Inanimate Lifting for office based staff
- Fire.

Discretionary courses are courses which managers nominate staff to attend based on the need of the service, they include:

- First Aid (Adult or Child)
- Managing Challenging Behaviour (MCB).

Health and Wellness Courses

We run a suite of Health and Wellness Courses on regular intervals throughout the year which are also discretionary courses, they include;

- Responsible and Safe Medication Management
- Supporting People with Epilepsy
- Diabetes
- Food Nutrition and Food Hygiene
- Supporting FEDS (Feeding, Eating, Drinking and Swallowing) and Modified Diets
- Peg Feeding.

Other regular health related courses which are organised on request from service managers based on a need in the service. They include:

- Hoist
- Abdominal Thrust
- Oxygen
- Slide Sheet
- Mattress Evacuation
- Wheelchair Clamping.

A number of the courses listed above are operated on a 3-year refresher cycle basis to ensure staff are kept updated in their knowledge and skills in these important areas.

The targets which Leadership set for these courses each year are based on the number of staff working in the organisation who need to be trained / refreshed within the year and the budget available. External factors such as HIQA Standards, legislation or other regulation are also factored into organisational target setting.

Requesting Bespoke Training

In addition to the above, the Association is regularly called to provide bespoke training to people who are in significant difficulty and who have behaviours of concern. Bespoke training events are arranged to address situations which cannot be addressed through the more general training programme. Typically, this type of bespoke training is provided by internal trainers although if required, external trainers may be engaged. The main events delivered internally include MCB Bespoke and a series of Modules in Autism Foundations.

Service managers should complete the Bespoke Training Request Form – SD5a (See Appendix 7) and submit to ETD if they wish staff to receive specialist or bespoke events. They will be required to give the reasons for the request, the staff names / numbers who will attend and suggested times for this to take place.

In the majority of case, bespoke training can be delivered in-house and for no significant cost. However, in some exceptional situations, there is a high cost and/or a significant level of coordination required to organise those events which we describe as ‘Advanced Bespoke Training’. It might involve Studio III, for example, or other external providers for a single event or a programme of events. Where there is a high cost / high input event, a more detailed training request form is required. In such eventualities, the requesting manager should complete the Advanced Bespoke Training Request Form – SD5b (Appendix 8).

ETD will then liaise with the trainer/s to schedule the training and will confirm the arrangements by email to the manager who made the request. Confirmation to those attending will be done by the service manager. The service manager must liaise with the trainer/s to ensure a record is taken of who attended the event using the Internal Training Record / Register – SD4 (See Appendix 6).

Obtaining Information about Assurance Level Training Events

There is a well established process of informing services, seeking nominations and forwarding approvals using an online system for Assurance training events which include Basic Skills / Health and Wellness courses.

Training Calendar

Basic Skills

ETD set up a Basic Skills Training Calendar of the Assurance Mandatory and Discretionary courses to take place over 3 *Terms* per year:

- Term(T) 1 - takes places between January and April
- T2 - takes place between May and August
- T3 - takes places between September and December.

Health and Wellness

The Health and Wellness programme is arranged in a more targeted manner with ETD staff coordinating the nominations directly with the managers of those services where particular training needs have been identified. Typically, these events run within the regular schedule of training calendars which is coordinated through ETD.

ETD liaise with internal and external trainers to arrange a spread of courses that is workable for trainers and attendees.

The number and type of course is based on the analysis of coverage levels against organisation targets and projected over the 12 month period to the end of the year.

Core / Oracle BI Training Reports

All nominating managers can access live online reports at any time which show their own training record and the record for the staff who report to them for the main Basic Skills and Health and Wellness courses.

The reports are stored on the Core / Oracle BI Internet Page and managers follow the instructions to open same (See Appendix 9).

The ‘Skills Coverage Refresher Cycle Report’ shows the month and year the staff are due to refresh their training. Blank fields on these reports inform managers that the staff have never attended the course. Nominating managers mainly use this report when nominating for a training calendar as the dates are colour-coded to indicate that staff are due to attend training in that year and the month detail informs them of the Term they need to nominate the staff for. Managers can also use the ‘Full Training Report by Staff Number’ to check the training history of any staff that work temporarily in their service to ensure they have required training completed.

Online Nomination System

When ETD have set up the Basic Skills Training Calendar with the trainers, a Nomination Form is generated from the Core Personnel Training Database and is sent as an attachment by email to all nominating managers. The email informs them of any items to note specifically for the calendar and gives them a stated date to return the form online. Managers are required to include the names and staff numbers of the staff in their service who are available and in need of attending each training course. Managers are required to discuss nominations with staff so they understand the need for attending the course/s they are nominated for and to ensure they are available should they get approved.

Confirmation of Approval - Approvals Report / SMS Approval and Reminder Text / WCA Intranet

Having received the completed nomination forms, ETD record the nominations on the database and select the staff who are Approved, Not Approved and Queried which is then generated into an Approvals Report. An email is sent to all nominating managers to prompt them to access their Core / Oracle BI Reports and to confirm with the staff they nominated if they are approved or not.

When the Approval Report has been made available to managers, an Approval Text is sent to all staff approved for training within the calendar period. A further Reminder Text is sent 2/3days before each course date. Please note these texts are intended to remind staff of training events they are scheduled to attend, however they are not intended as a substitute for direct communication between the line managers and staff.

All staff can access details relating to a calendar period on the Training Page of the organisation's Intranet including the schedule of courses and list of staff approved for each date.

5. Enhancement Training

Enhancement training provides staff with an opportunity to develop their knowledge and skills to a more advanced level. This type of training is often referred to as 'external training' as the majority of events are provided by external trainers or organised by external bodies.

Obtaining Information about Enhancement Training Events

Over time, a range of themes emerge from organisation requirements and engagement with people supported, families and staff including for example:

- A skills acquisition theme such as a teaching/instructional method
- A communication approach
- A life cycle theme such as Ageing
- A characteristic of the population such as Autism or Dementia in people with Downs's Syndrome
- Developing new perspectives and capacities such as the practical application of Social Role Valorisation.

These themes are incorporated into organisation plans as areas for focus for Enhancement Training.

Some Enhancement events or training programmes are delivered in County Mayo while some are organised at out of county venues. The relative cost of the latter makes it not viable to send large numbers of staff. However, there is intentional capacity building where the opportunity arises. For example, in the area of Sexuality and Relationships, Dementia or Family Leadership, Early Bird in Autism Training, staff have availed of ‘out of county’ training events which have then impacted organisation level capacity and responsiveness.

In other cases, we have run a programme of Enhancement Training within the county to address particular themes or topics which emerged as significant based on feedback over time. The most recent example of this includes the longitudinal programme of Social Role Valorisation (SRV) Training by Hope Dittmeier.

In addition to the above, there is a focus on maintaining Multi-Disciplinary Team (MDT) staff skills in areas of significance for them in terms of Continuing Professional Development (CPD) and ensuring this is aligned to topics of organisational priority.

Some examples include Ageing and Dementia, Capacity and Consent, Protection and Investigation, Sexuality and Relationships, Assistive Technology, etc. Other organisation support functions also undertake training where necessary in emerging areas such as new developments of relevance in IT.

The communication and organisation of Enhancement Training events happens primarily in four ways:

1. Strategies for identifying the relevant staff may involve a particular focus on a topic e.g. Sexuality and Relationships, which then results in a selection process as distinct from a nomination process
2. In some instances, the organisation may be made aware of a forthcoming event as a result of the circulation of information by the event organisers. If the event has particular relevance to some staff, they can be made aware of the opportunity
3. In other cases, staff may become aware of events which are being run out of the county through their networks and a process of nomination using the Enhancement Course Application Form – SD1 (See Appendix 1) is undertaken
4. In other instances, the Association will target a particular topic which has emerged as a significant theme through Personal Outcomes reviews or other sources and a training strategy will be identified which involves bringing external trainers to County Mayo to deliver a series of workshops or events. By bringing the training to the County we can ensure that reasonably significant numbers of staff have the opportunity to avail of this.

Requesting Formal Approval

Once the initial stage of deciding nominations is completed, a formal application to the Head of ETD is required. This is done using the Enhancement Course Application Form – SD1 (See Appendix 1).

The form must be completed *in full* or the request for attending will not be processed. It should be completed by the relevant staff and submitted through their Frontline Manager. If the proposal is focused on the same outcome for a number of staff the

Frontline Manager can complete a joint submission on behalf of their staff in order to avoid duplication.

The first page of the SDI form looks for the details of the event and of the staff being nominated, the costs associated, the budget these will be covered by and any efforts being made to reduce costs.

The second page is focused on the Training Proposal and queries the outcome expected from staff attending the event.

Supporting materials such as a course flyer, etc should be submitted with the application form.

The Role of Staff and Frontline Managers in the Application Process

The basic principle which should guide thinking is the evidence of need and the role any particular training event or programme will play in addressing this need. Each participant in the discussion needs to take active responsibility for their role in the outcome. The manager needs to ensure they have clear reasons to support the training nomination and are committed to its implementation.

A staff requesting training must take responsibility for ensuring it is in line with the priorities of the service. They also must be prepared to work at obtaining the skills and knowledge which are on offer at the training event and for using that skill and knowledge on their return to the service to the best of their ability.

Managers are expected to have ownership of and commitment to the training that is offered to their staff. If a Frontline Manager does not support a training request, it should be discussed with the staff in question to ensure they understand the reason for this. If they support the request, they must take responsibility for their part in the nomination and for managing the implementation of learning in practice. The process of planning an implementation strategy is essential *before* staff attend the training. This should be planned with the staff in the preparation stage in advance of the event or programme.

Factors Which Will Be Considered when Deciding Approvals for Enhancement Events:

- The relevance of the course compared to the training priorities in the Association/Area/Service/Department
- The number of applicants compared to the number of places
- The equity of the distribution of training places compared to previous training opportunities for individuals or groups
- The estimated impact of the training; some courses need to be focused on specific staff groups, in other cases individuals from a spread of locations may attend and give useful feedback to their local service
- The previous performance of individuals or groups in demonstrating a willingness to use knowledge and skills obtained through training
- The degree of urgency attached to a particular training need; while equity is important it may be that, from time to time, certain staff groups have training needs which are recognised as critical by the Association. Therefore, certain areas of the service may receive a greater proportion of training during certain periods

- The cost of the particular training request needs to be considered in relation to overall priorities in the context of the training budget.

The Role of Senior/Regional Services Managers / Service Managers / Heads of Departments in Deciding Approvals

Regional Services Managers / Service Managers / Heads of Departments have a pivotal role in deciding the relevance of training courses to the needs of their areas. They are also in the best position to decide how the training will provide the most impact. They need to ensure the key questions have been considered in the development of the Training Proposal to ensure it meets the identified needs.

The Role of the Head of the ETD in Deciding Final Approvals

The Head of ETD will have an overview of all applications, training issues and priorities, costs and budgetary conditions. They will therefore have the final decision on approvals. In reaching final decisions, there will be discussion and consultation with the Regional Services Managers / Service Managers / Heads of Departments.

Informing the Relevant People about Course Approvals

Once a decision has been reached about final approvals, ETD will confirm this through the line structure. Communication usually takes place by email and/or phone. If there are pressing time constraints, ETD will contact the staff nominated directly to confirm arrangements.

Staff approved will receive an Approval Letter, a Staff Development Evaluation Form - SD2a and a Staff Development Expenses Claim Form - SD3a in the internal post.

6. Attendance at Training

Records of Attendance at Training Events

A register is done up prior to all Basic Skills / Health and Wellness training events listing the names of the staff approved to attend. This register is used as a record of the staff who attended the training for entry into the training database.

In the case of Enhancement training events, a record is generated via the nomination process and retained by ETD. Details of attendance are also entered on the training database. This data is available for review by all relevant managers.

Staff Obligations regarding Attendance of Training

Once a training nomination has been approved, it is the responsibility of the staff member to ensure they attend on time, sign the attendance register and remain for the duration of the training event. If, for any reason, staff have not fully completed the course, they must ensure ETD and their manager are notified that their training is incomplete so that an accurate record of the status of their training can be recorded and attendance at a future event can be arranged if possible.

Once a staff member has been notified of approval to attend a training event, it is their responsibility to ensure their manager and ETD are informed if, for any reason, they are subsequently unable to attend.

Cancellations from Training Events

It is vital that any cancellations by staff are firstly notified directly to their manager. This ensures the manager is informed of their inability to attend the course they nominated them for and it gives the manager the opportunity to arrange a swop or replacement within the service. The manager will then inform ETD of the change required and the reason for the change. If the staff is unable to contact their manager or a person in charge, they should contact ETD at the earliest possible opportunity to inform them of the cancellation and the reason so that arrangements can be made to fill the vacated training place.

Attendance at training events carries the same obligations as attendance at work. Cancellations of training places may not be undertaken without valid reasons such as sickness, other work priorities, etc. ETD record the reason given for every cancellation.

For Basic Skills training, ETD report the level of Cancellations Activity by Term and by Year at Leadership Team. A report on the amount of cancellations and the reasons is generated at the end of each calendar which can be circulated at management level if any concerning patterns arise.

In the case of Enhancement events, cancellations may result in forfeiture of fees and therefore any reason for non-attendance must be for illness or exceptional reasons approved by the relevant senior manager.

No Show No Contact

If a staff does not attend a Basic Skills Training event and has not contacted their manager / ETD to cancel, an email is sent on the same day to their Regional Services Manager/Head of Department and Frontline Manager and copied to the Head of ETD giving details of the staff and the course they were due to attend. The Frontline Manager is requested to follow up with the staff and feedback the reason for No Show via return email to all. If their reason is invalid, they are recorded on the database as a 'No Show No Contact'. The level of No Show No Contact Activity is calculated by Term and by Year and is reported at Leadership Team. A 'No Show No Contact' report is developed at the end of each training calendar which can be distributed at management level if any concerning patterns arise.

A 'No Show' is the equivalent to failing to turn up for work and failing to notify the Frontline Manager of this. It results in the loss of a training place which increases the cost per head and also requires another place to be provided to this staff at a later time to ensure they remain in coverage. This also affects the cost. Failure to maintain training coverage may impact the service capacity to respond to people, e.g. failure to stay refreshed in First Aid may have serious consequences to an individual in the event of an accident. In the case of Enhancement Training, it has the added fallout of forfeiture of fees paid in advance.

In either case, it is a serious matter and requires immediate attention by the Frontline Manager. Where there are instances of repeat 'No Shows', the matter will be subject to disciplinary measures up to and including termination of employment.

7. Evaluation of Training

Evaluation of Assurance Training Events

Staff Development (SD) Course Evaluation Forms - SD2b's are distributed at the end of each course (See Appendix 3). Each person must complete this form and return it to the trainer. The trainer will read over the evaluations and give them to ETD who will review for any matters arising. When the review is complete, the form will be held on the Training Course File in ETD.

Evaluation of Enhancement Training Events

On completion of a course, each staff attending must fill out the Staff Development Evaluation Form - SD2a and forward same to their Frontline Manager (See Appendix 2). The 'Manager Evaluation' section of the original form must be completed by the manager who nominated the staff to attend. When completed, the manager will forward to ETD. The Head of ETD then reviews the evaluations on a monthly basis. Where levels of dissatisfaction are evident in staff feedback, follow up is made to clarify this.

ETD photocopy the signed evaluation form and maintain the original on the Training Course File which is held in ETD. At the end of every Term, ETD group the photocopied forms to send to the Frontline Managers of the staff who completed the evaluations. The managers are requested to give the copied evaluations to their staff during their Support and Supervision sessions as this encourages follow up discussions on the training to take place between the manager and staff that attended.

Personal Records of Training

The staff member should maintain the copy of their completed SD2a forms in their 'Personal Training Folder' which is supplied by ETD to all staff attending WCA training as this will provide a record of the training event and of their views about it.

Staff members should also maintain a copy of all hand-outs, literature and articles given at, or as a result of, attendance at the training event. It would also be a useful idea for staff to keep any notes they have taken at a particular training event alongside the SD2a and course hand-outs in their Personal Training Folder.

The reason for maintaining a Personal Folder of training events is so that staff can build up a portfolio of training experiences and information. This should prove valuable in reflecting on training received, how useful it is or is not, what helps to put plans into action and what gets in the way. It will also be useful as a source for reference reading.

Building on Learning

An additional manner of extracting added value from staff training is the use of Training Review Groups. These consist of groups of staff who have attended the same training event, such as Social Role Valorisation who can come together to share the experience of trying to apply these skills and knowledge back in their services. Training Review Groups provide opportunities for the advancement of the particular skills or approaches by pooling knowledge, sharing developments, looking at common successes and barriers to success in applying the learning from the training topic in question.

Staff will be expected, from time to time, to attend Training Review Groups to contribute to the consolidation of skills and knowledge they have gained in training events and for the development of improved means of applying this learning in day to day practice, both within the topic of groups and throughout the wider services. The use of a Personal Training Folder containing the staff training evaluations, articles, notes, etc. would be a very helpful and practical resource for people attending training review groups.

Collating Feedback from Enhancement Training Events

Feedback from staff who attended courses is mainly collated using the SD2a form. Occasionally, written reports are forwarded or sought if the event has been of particularly high expense/interest. If courses provide hand-outs, literature, DVD's, etc., those attending are asked to forward a copy to ETD to be retained on the Training Course File as a resource for other staff if it has some general applicability.

Feedback is sought to:

- Determine the staff's satisfaction with the course as a reference for the future value of the course, tutor, organising body, etc.
- Determine the main points of learning which they took from the course
- Identify any actions they may intend to take as a result of the training event
- Obtain their views on future training needs arising from learning on this event
- Be a source of information about the types of learning which appears to be most effective for individuals or groups
- Be an appropriate obligation on the staff's behalf for the support of the organisation.
- If a course receives a poor rating this is noted with respect to its future value.

8. Claiming Expenses for Attending Training Events

Assurance / Basic Skills Training

When staff attend the regular Assurance - Basic Skills and Health and Wellness Training Calendar events, the trainer will circulate an Expenses Claim Form - SD3b at the end of the course (See Appendix 5). This is done in conjunction with the SD2b Evaluation Form as expenses will not be processed if staff have not evaluated the training they attended.

The following rules apply regarding claims for Assurance - Basic Skills and Health and Wellness Training Events:

- The official base for each employee for travelling expenses purposes shall normally be their place of work however if a journey commences from a location other than an employee's official base, e.g. home, then the mileage claimed must be limited to actual miles travelled i.e. staff can only claim travel expenses for actual mileage incurred
- Staff are only entitled to claim travel from the work base they have been nominated to attend the event from to the location of the training

- If staff live in the same area as where the training is taking place but their work base is outside of the area, they are not entitled to claim travel unless they have travelled from the work base to or from the course
- Service managers must ensure every effort is made to share travel from services located outside the training location to reduce the number of claims
- Staff must adhere to the Standard Mileage Distances agreed by the organisation (Regulation for Travelling Expenses and Subsistence Allowance - Finance Procedures)
- Mileage will be paid at a single flat training rate
- Lunch expenses can be claimed for full day events only up to €5.00 per person and will only be paid when receipt is attached to the SD3b claim form
- The SD3b claim form cannot be processed without the signature of the staff making the claim
- Staff submit the SD3b direct to ETD for sign off and will then be forwarded to Wages & Salaries Department once per month for processing.

Enhancement / External Training

When staff apply to attend Enhancement/External training events, ETD send those attending an Expenses Claim Form - SD3a in their approval pack (See Appendix 4). This is done in conjunction with the SD2a Evaluation Form as expenses will not be processed if staff have not evaluated the training they attended.

The following rules apply regarding claims for External Training Events:

- The official base for each employee, for travelling expenses purposes, shall normally be their place of work however if a journey commences from a location other than an employee's official base, e.g. home, then the mileage claimed must be limited to actual miles travelled i.e. staff can only claim travel expenses for actual mileage incurred
- Set Petrol Rates are applied to external training events as agreed at Leadership level
- Public Transport can be used to get to events. Staff need to look into options such as booking online to help keep costs to a minimum
- Service managers must ensure every effort is made to share travel to reduce the number of claims
- An allowance of up to €80 for B&B per person night can be claimed. Any amount exceeding this must be covered by the staff unless approved in advance by ETD as part of the application process. ETD can book accommodation when a number of staff are requiring accommodation to avail of group discounts
- If lunch is not provided, staff can claim up to €8.00 per person per day for lunch
- Subsistence may be claimed in instances where attendance at a training event requires a staff member to be over five hours away from base after lunch. The lunch period is considered as ending at 2.00pm. Therefore, staff who would not arrive back to their work base until after 7.00pm are entitled to claim up to €16.00 for subsistence. This 5hr period between 2.00pm and 7.00pm must be exclusive of any time spent in obtaining a meal and such time cannot be included in calculating time absent from their work base for this purpose
- If an overnight stay is involved, staff can claim up to €16.00 for subsistence in the evening

- The maximum allowance for any 24 hour period is €80.00 + €16.00 = €96.00. If staff expect to incur an expense above the maximum limit, they must check with ETD in advance and get approval in advance, otherwise the expense may be disallowed
- Receipts for any expenses staff wish to claim must be attached to the SD3 Expenses Claim Form
- The SD3a claim form cannot be processed without the signature of the staff making the claim
- Staff submit the SD3a direct to ETD for sign off and will then be forwarded to Wages & Salaries Department once per month for processing.

Staff Replacement Costs

Staff Replacement Costs are mainly claimed for Basic Skills Training calendar events. Staff who regularly attend Enhancement courses are not usually replaced. As the costs of training can be substantially increased by staff replacement costs, it is expected that every effort will be made to replace staff only when this is clearly necessary.

Reimbursement for the cost of replacing staff for absences from their place of work arising from attendance at staff training events which cannot be avoided can be claimed by Residential and Individualised Services only from the Training Budget.

In exceptional circumstances, Managers of Day Services can contact the Head of ETD if staff urgently require training to request replacement to allow the staff to get the essential training when they can't manage cover within their own team.

There are also situations in Day Services where staff work in a 1:1 capacity and have difficulty being released for training if they are not replaced. In some instances, services who have a number of 1:1 staff will operate through internal arrangements to facilitate the staff to attend training. It is acknowledged that this is not always possible and the Service Manager can have a standing arrangement with the Head of ETD that staff may be replaced under certain conditions agreed with them.

Residential and Individualised Services Managers must specify the number of replacement hours required for each staff for whom they are requesting training and the grade at which the replacement hours will apply. Note travel time from work base to the training location and the lunch hour given on full day courses are not covered.

Each training event has a unique Course ID Number. All correspondence and forms such as the Approvals Report, the SD2a and SD2b Evaluation Forms and the SD3a and SD3b Expenses Claim Forms, text messages, etc. state the ID number for the specific training event to which it is related. Any claims must include this Course ID Number to allow for all expenses to be tracked when generating training expenses reports.

When staff have been replaced, claims are returned using the PAY03 Payment Sheet (See 3A.21 Completion of Payroll Returns for All Employees - HR Procedure). The form prompts staff to record the Cost Centre the hours are to be charged to. The manager has to ensure that if the hours are costed to Training, the Training Course ID Number is clearly recorded and the hours claimed are accurate on the form. The manager then signs the forms and submits to Wages & Salaries Department directly.

In most instances where staff are replaced, the replacement cost will be incurred on the day on which training takes place. From time to time it may be the case that the replacement cost is not incurred until a later date. This could happen, for example, if a residential staff attended a training event on a day for which they were not rostered for duty and subsequently took a day in lieu some weeks later for which they were replaced. This replacement cost then arises from the Staff Training event but is incurred several weeks after the event. In order to recoup the cost to the service budget, the service manager should state the relevant course ID Number for the replacement hours incurred that week.

9. Internal Training, Facilitation, Information and Briefings

There are a wide range of events delivered to services locally*. Facilitation is provided by ETD staff in areas such as IP, Risk Assessment, HIQA Tools and Templates, etc. Internal training is also arranged by teams such as Autism for their own staff. Locally arranged events can also be delivered through various multi-disciplinary team staff such as SLT, Social Work, BSS, Physio, Psychology and OT. Locally arranged events may also be delivered by organisation support staff such as HR, IT, Health and Safety, etc. There are also occasions when Western Care staff or staff from other Organisations attend staff meetings or specially arranged events to deliver short information sessions, briefings, etc. In some cases, the distinction between formal training, facilitation and information, and briefing sessions may become blurred and there is a dilemma about how best to maintain a record of this.

Records for Core Training Database

Any formal training or facilitation events arranged centrally through ETD must be recorded using the SD4 Internal Training Record / Register which lists those in attendance and briefly describes the content (See Appendix 6). This completed form should be forwarded to ETD for inclusion on the Core Training Database by the trainer facilitating the training if Western care staff member or by the Service Manager if trainer is from another Organisation.

For events that involve briefings, information sessions, problem solving meetings, etc. it is not always necessary to record these on the centrally held Training Database.

Records to be Held Locally

There is an increasing volume of short events involving information and briefing sessions or product demonstrations about clinical and health issues, arranged locally through the service. Typically, these involve staff from other Organisations such as the HSE incontinence nurse, diabetic nurse, infection control nurse, dietician, etc. ETD does not keep a central record of these events as there is a considerable mix of individual case level advice along with general information and the line between training and clinical guidance is at times very fine. In these situations, the Service Manager should use the SD4 to keep a record of the content and the staff attendance in their local files where they feel this has a value for their own use or to demonstrate to HIQA or others the events that have been organised by the local service.

If an event is organised in conjunction with ETD, the manner of recording the event will be agreed in advance. If the event is locally organised and the Service Manager

wishes to maintain a record of the event and is uncertain about whether it needs to be centrally recorded or maintained only as a local record, then the Manager should discuss the matter with ETD.

In all cases for which locally arranged events take place, a local or central record can be generated. It is essential that in order to maintain a common standard of record that the same type of information is captured. Therefore, all such records of locally arranged events must use the SD4 form as the standard record.

*Locally arranged events in this context refer to events arranged between the local service and the person(s) delivering the event. It does not refer to those centrally arranged events which may be delivered locally as part of the Basic Skills Calendar through ETD.

Training For Parents / Guardians, Service Users and Family Members

From time to time, Western Care staff may provide formal training to parents/guardians, service users and other family members, for example Family Leadership, Early Bird, Lámh signing or Hanen Parents Groups. In such cases, the person providing the training should maintain a record of presenters, attendance, general content and duration of the course, time involved, etc. by completing the SD4 form.

Training Provided to Non-Western Care Staff

On occasion, Western Care personnel may deliver training exclusively to non-Western Care personnel. Examples of this include the provision of training for local national school teachers, community playgroup leaders and non-Western Care voluntary community groups. Such training will arise in the context of a specific project which has been discussed and agreed through the line management.

This will not normally have direct funding implications for the training budget which is exclusively maintained for the development of Western Care personnel.

However, as such training may have strategic significance and practical importance in the agreement of priorities and workloads, it is important that a record of all such training be maintained. Such a record is intended to reflect the work and contribution of Western Care personnel in this area and to ensure the appropriate information is available for analysis and evaluation.

In order to maintain such a record, the principal provider of the training (i.e. the person nominated to co-ordinate the training) will be responsible for completing the SD4 form.

10. References

Lombardo, Michael M; Eichinger, Robert W (2000). The Career Architect Development Planner (3rd ed.). Minneapolis: Lominger.

Appendix 1 - Enhancement Course Application Form – SD1

This form can be completed by an individual staff and submitted through their Line Manager or the Line Manager can complete on behalf of a number of their staff to apply for an Enhancement/External Training Event.

Please attach any supporting information to this form such as a Course Flyer.

EVENT DETAILS:	
Event Name:	
Presenters:	
Organising Company:	
Location:	
Date/s:	
Start/End Times:	

NOMINATION DETAILS:			
Staff No:	Staff Name:	Area/Department:	Position:
1.			
2.			
3.			
4.			
5.			
6.			

Please describe any arrangements that have been made in advance which will reduce the cost of attending this event?

ESTIMATED EXPENSES DETAILS:	
Course Fee:	€ _____ (Euro)
Will you need to be replaced at work to be able to attend?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Travel required? Car (Shared if more than 1 attending) Train – online booking available Bus/Luas/Dart Taxi	Please tick what means of Transport you will need: Car <input type="checkbox"/> Train <input type="checkbox"/> Bus/Luas/Dart <input type="checkbox"/> Taxi <input type="checkbox"/>
Accommodation required? Hotel (up to €80.00 max per night) B&B Stay with someone	What Accommodation arrangements are needed? Hotel <input type="checkbox"/> B&B <input type="checkbox"/> Own arrangements <input type="checkbox"/>
Subsistence: (if food is not provided) Lunch (up to €8.00) Evening Meal (up to €16.00)	What Food will you need to pay for? Lunch <input type="checkbox"/> Evening Meal <input type="checkbox"/>
To What Budget will this be costed? Please tick each relevant box:	ETD <input type="checkbox"/> My Department/Area <input type="checkbox"/> Other <input type="checkbox"/>

Please ensure that each section above and the **Training Proposal** section on the next page of this form has been fully completed. This is required **before** any final approval can be given.

Training Proposal

The form must be completed in full or the request for attending an Enhancement/External Training Event cannot be processed. One proposal may cover a number of candidates if it is developed jointly in order to avoid unhelpful repetition/duplication.

(Please complete by typing into each of the boxes below which will adjust to the size required for your full response)

- 1. Please identify any specific priorities or challenges in your role that this training is expected to address:**

- 2. What will change as a result of your attendance at this event? (These changes may be in individual practice or team / organisation level actions)**

- 3. How do you plan to implement the learning from this event?**

- 4. Identify others on whom your implementation plan will have an impact and confirm if you have agreed this with them:**

Name & Role of Person completing this form:

Name of Event this Proposal relates to: _____

Signature of Line Manager: _____ **Date:** _____

Approval of Head of ETD: _____ **Date:** _____

Appendix 2 - Course Evaluation Form - SD2a

Personal Details:

Employee No & Name: _____

Department: _____ Manager: _____

Training Event Details:

Course ID & Name: _____

Course Date(s) / Times: _____

Course Location: _____

Course Provider(s): _____

What prompted this event? Own Request Manager's Request Other

If other, please state:

Did you receive adequate preparatory information about this course? Yes No

Did you receive adequate notice about this course? Yes No

Your Assessment of the Course / Event:

For the following questions, please circle one option only

What did you think of the relevance of the course content?

Poor Fair Adequate Good Excellent

How do you rate the quality of the presentation?

Poor Fair Adequate Good Excellent

How do you rate the quality of the location and facilities?

Poor Fair Adequate Good Excellent

What lessons did you take from this event / find most useful?

What, if any, actions do you intend to undertake in your centre / service as a result of this training event?

Were there any topics/points that were unclear? Do you have any further questions?

If you have one suggestion on how to improve the course, what would that be?

Do you have any further comments, for example further training needs in this area?

Would you recommend that other staff in your service, department, or division attend this course? Yes No

Staff Signature:

Date:

*Please forward **ALL 3 PAGES** to your manager - you must consult actively with your manager in the evaluation of this course. Thank you.*

MANAGER EVALUATION

To be completed by Employee's Manager

Manager Name: _____

How much of a priority was this training event for staff in your service?

Very Low

Low

Average

Required

Urgent

How would you rate the actual value gained by staff from this training event?

Poor

Fair

Adequate

Good

Excellent

Do you have any further comments, e.g. further training needs in this area/s?

Would you recommend that other staff in your service attend this course?

Yes

No

If no, please specify why not:

Signed By:

Manager Signature:

Date:

Please forward the fully completed form to ETD. Please keep a copy to use in your next Supervisory Support meeting.

ETD PERSONNEL ONLY:

Read by:

Signature:

Date:

Signature:

Date:

Comments:

Appendix 3 - Course Evaluation Form - SD2b

Personal Details:

Employee No & Name: _____

Department: _____ Manager: _____

Training Event Details:

Course ID & Name: _____

Course Date(s) / Times: _____

Course Location: _____

Course Provider(s): _____

Your Assessment of the Course / Event:

For the following questions, please circle one option only

What did you think of the relevance of the course content?

Poor Fair Adequate Good Excellent

How do you rate the quality of the presentation?

Poor Fair Adequate Good Excellent

How do you rate the quality of the location and facilities?

Poor Fair Adequate Good Excellent

What lessons did you take from this event / find most useful?

If you have one suggestion on how to improve the course, what is it?

Signed:

Please forward to ETD and if appropriate to claim expenses, include SD3b Form. Thank you.

ETD personnel only

Read by:

Date:

Appendix 4 - Expenses Claim Form - SD3a

You must submit a fully completed Course Evaluation Form – SD2a with this form.

Personal & Training Event Details:

Employee No & Name: _____
Employee Address: _____
Service / Department: _____
Course ID & Name: _____
Date(s) / Times of Course: _____
Course Location: _____

Claims for Mileage Expenses / Vehicle Details:

State the Mileage incurred for actual journey to attend training (from Work Base or Home whichever is lesser) to the Training Location.

Date/s:	Journey From: <u>(Agreed Work Base / Home)</u>	Journey To: <u>(Training Location)</u>	Total MILES Driven / Set Petrol Rate:
---------	---	---	---

Vehicle Make and Model: _____ Registration: _____

Names of Passenger/s (to be filled in by Person Claiming Expenses):

--

Other Costs (Cannot be claimed without Corresponding Receipt/s attached):

Transport:	_____
Accommodation: (Up to €80.00 per night)	_____
Subsistence: (only if Food is not provided)	_____
▪ Lunch (Up to €8.00)	_____
▪ Evening Meal if Return to Work Base is after 7pm (Up to €16.00)	_____
Other	_____

The maximum allowance for any 24 hour period is €80.00 + €16.00 = €96.00. If you expect to incur an expense above the max limit, you must check with ETD and get approval in advance, otherwise the expense may be disallowed.

I certify that the above expenses were **necessarily incurred** when attending this approved course.

SIGNATURE of CLAIMANT: _____

OFFICIAL USE ONLY

Approved by: _____
(ETD Personnel)

Accounts Use Only:

Calculation:
Other

Rates x Miles

Total Expenses:

Appendix 5 - Expenses Claim Form - SD3b

You must submit a fully completed Course Evaluation Form – SD2b with this form.

Personal & Training Event Details:

Employee No & Name: _____

Employee Home Address: _____

Service / Department: _____

Course ID & Name: _____

Date / Times of Course: _____

Course Location: _____

Claims for Mileage Expenses / Vehicle Details:

State the Mileage incurred for actual journey to attend training (from Work Base or Home whichever is lesser) to the Training Location.

Date(s):

Journey From:
(Agreed Work Base / Home)

Journey To:
(Training Location)

Total MILES
Driven:

Vehicle Make and Model:

Registration:

Names of Passenger/s (to be filled in by Person Claiming Expenses):

Other Costs (Cannot be claimed without Corresponding Receipt/s attached):

Transport:

Lunch up to €5.00, attach receipt: (only if Food is not provided)

Other:

I certify that the above expenses were **necessarily incurred** when attending this approved course.

SIGNATURE of CLAIMANT: _____

OFFICIAL USE ONLY

Approved by: _____

(ETD Personnel)

Accounts Use Only:

Calculation:

Rates x Miles

Total Expenses:

Other

Appendix 6 – Internal Training Record / Register – SD4

Name + Service of Western Care Staff / External Facilitator delivering training: _____			
Training Delivered To (please tick): Internal Staff <input type="checkbox"/> Families <input type="checkbox"/> Non WCA Staff <input type="checkbox"/>			
Title of Training Event: _____			
Date/s: _____		Times: _____	Duration (In Days): _____
Venue: _____			
Participant Name (Block):	Signature:	Employee No:	Service / Department:
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Briefly state the Purpose of this Training Event:
List the Key Points of the Contents of the Training delivered:

Were Handouts used? (If yes, please attach a copy) YES NO

Were Evaluation Forms (SD2a or SD2b) used? YES NO

Any additional comments?

Trainer/s Signature: _____ **Date:** _____

Please attach a copy of any **relevant materials** relating to this event to this form and return to ETD for recording purposes on the Training Database.

Appendix 7 - Bespoke Training Request Form – SD5a

(To be completed by the Service Manager and submitted to the Evaluation & Training Department (ETD) via Email)

Title of Training being requested:					
Name of Trainer / Company that will facilitate (<i>if known</i>):					
Name of Service requesting training:					
Proposed Location for bespoke training to take place:					
Proposed Day of Week and Time of Day suitable for staff to attend this training:					
	Staff required to attend:	<i>Staff Number if WCA Staff:</i>		Staff required to attend:	<i>Staff Number if WCA Staff:</i>
1.			9.		
2.			10.		
3.			11.		
4.			12.		
5.			13.		
6.			14.		
7.			15.		
8.			16.		
Briefly describe the Reasons for this training request and the Key Issues which need to be addressed:					
Assess the Urgency of the Request:					
Note: Subsequent to the completion of the Bespoke Training, please ensure the Internal Training Record / Register – SD4 is completed, <u>signed by all staff present</u> and submitted to ETD along with any evaluation forms used.					
Signed: _____ Date: _____ (Service Manager coordinating this request)					
Approval by ETD Member:					
Signed: _____ Date: _____					

Appendix 8 - Advanced Bespoke Training Request Form - SD5b

The **purpose** of this Advanced Bespoke Training Request Form is to ensure there is **clarity** about the **need** for training and the **desired outcome** for this. Advanced Bespoke Training can be once off or involve a series of events. However they will typically involve a level of cost that requires clarity more in depth consideration. There is an obligation to follow through with a **report after the training** to determine if the outcome is met. The **nature of the report** will be agreed in advance with ETD as it will vary depending on the cost and complexity of the event. There is a value for money accountability required to ensure we are getting **appropriate results for expenditure**. This form is to be completed by the **Frontline Manager** and submitted to ETD via the Senior/Regional Services Manager / Head of Department.

Title of Training being requested:					
Name of Trainer / Company that will facilitate (if known):					
Name of Service requesting training:					
Proposed Location for bespoke training to take place:					
Proposed Day of Week and Time of Day suitable for staff to attend this training:					
	Staff required to attend:	<i>Staff Number if WCA Staff:</i>		Staff required to attend:	<i>Staff Number if WCA Staff:</i>
1.			9.		
2.			10.		
3.			11.		
4.			12.		
5.			13.		
6.			14.		
7.			15.		
8.			16.		
Briefly describe the Reasons for this training request and the Key Issues which need to be addressed:					

What Outcome do you envisage as a result of this Bespoke Intervention?

As arrangements may vary depending on the nature of the situation please identify the Person who will:

Note: If different people are responsible for different parts of 1, 2 or 3 below, please state the Name of the Relevant Person against each section. If the same person is responsible for each section, please state this:

1. Co-ordinate and lead the preparation phase involving gathering and summary of relevant information, communicating the purpose to those who are due to participate.

2. Organise and lead the logistical and practical arrangements, venue etc. with the participants. This may include a meeting with the person, their family and key supporters.

3. Co-ordinate and lead the follow up to the visit to ensure agreed recommendations and actions are implemented and reported to the Executive Director via the Senior/Regional Manager.

4. Complete any interim and final reports which should be submitted to the Executive Director and copied to the Head of ETD via the Senior/Regional Manager.

Note: Subsequent to the completion of the Bespoke Training, please ensure the **Internal Training Record / Register – SD4** is completed, signed by all staff present and submitted to ETD along with any evaluation forms used. Any reports written by outside trainers should also be forwarded. A Bespoke Training Report may also be required. This will be agreed in advance.

Signed: _____ **Date:** _____
(Service Manager coordinating this request)

Approval by ETD Member:

Signed: _____ **Date:** _____

Appendix 9

Some Questions Staff Might Ask Themselves Before Applying For A Course:

- How important is the learning, skills or information being offered for the contribution I can make to this Centre/Home/Department?
- Does the Head of this Centre/Home/Department share my view of its importance?
- Is there a more important or relevant training opportunity coming up to my knowledge and, if so, should I discuss that opportunity with my manager before I apply for this other course?
- Is this course more important than other things that need to be done here at this time?
- Can I define the outcome or result that I expect to obtain from this training?
- Do I know if it is a skill I want to develop or is it information I really need or do I want to get a new approach or work on my attitude to something? Does the training event seem like it matches the objectives I've defined? Will it give me the things I want or is there a better way to get this? For example, could reading an article give me the same information?
- What has been my previous experiences of this type of course, has it changed my behaviour anyway? Will this give me what I want?

Some Questions The Head Of Centre/Home Might Consider Before Nominating A Staff Or Supporting A Request From Staff:

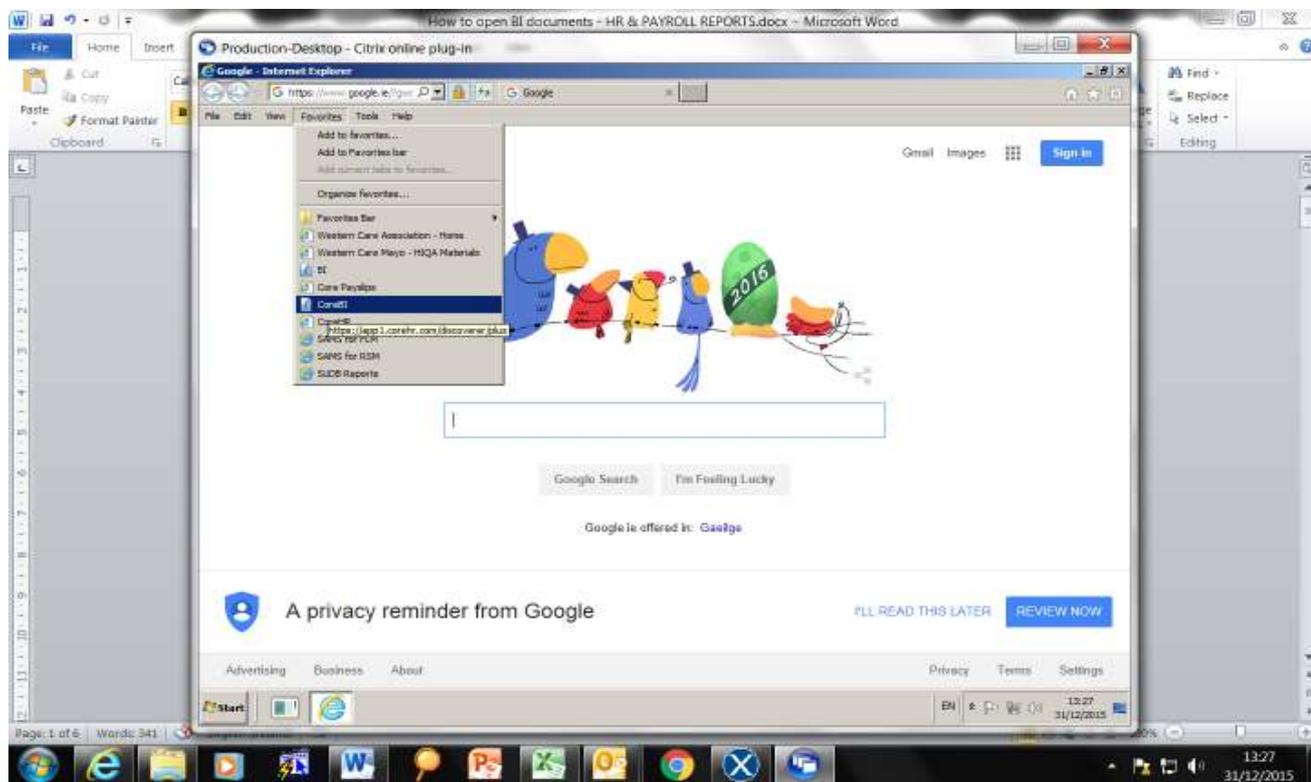
- How appropriate is the course for staff in your service based on the needs of the people supported?
- If it is appropriate is it also important right now? Just how important is it at the moment?
- Does it meet the picture that has been agreed about the direction for this service? Does it reflect discussions about the needs and priorities of the people who use the service?
- Does your manager share the same view of the relative importance of this course for this staff at this time?
- Will this staff member be committed to returning with the knowledge and skills from the course and sharing it with the Service? What has been the previous evidence of this?

- Will the Regional Service Manager / Service Manager / Head of Department feel they are being left with the job of saying 'no' because you don't like saying no? What messages are you giving the staff and your manager about the way you make decisions?
- What improvements or changes might you expect to result from this staff member attending the course? Will they learn new skills or do you hope for a change in attitude. If so is this training event likely to achieve this? What has previous experience shown?

Appendix 10

FIND CORE / ORACLE BI REPORTS

1. Log on to CITRIX (for citrix users)
2. Open INTERNET EXPLORER
3. Go to FAVOURITES and find and open (double click) the Core BI favourite



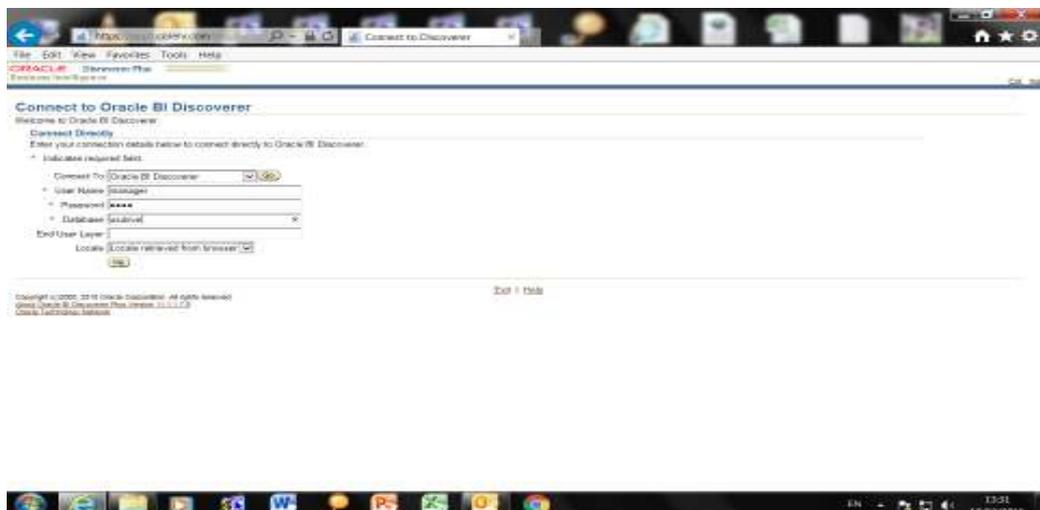
4. LOG ON TO BI

User name = manager

Password = 1234

Database = wcalive

Select GO



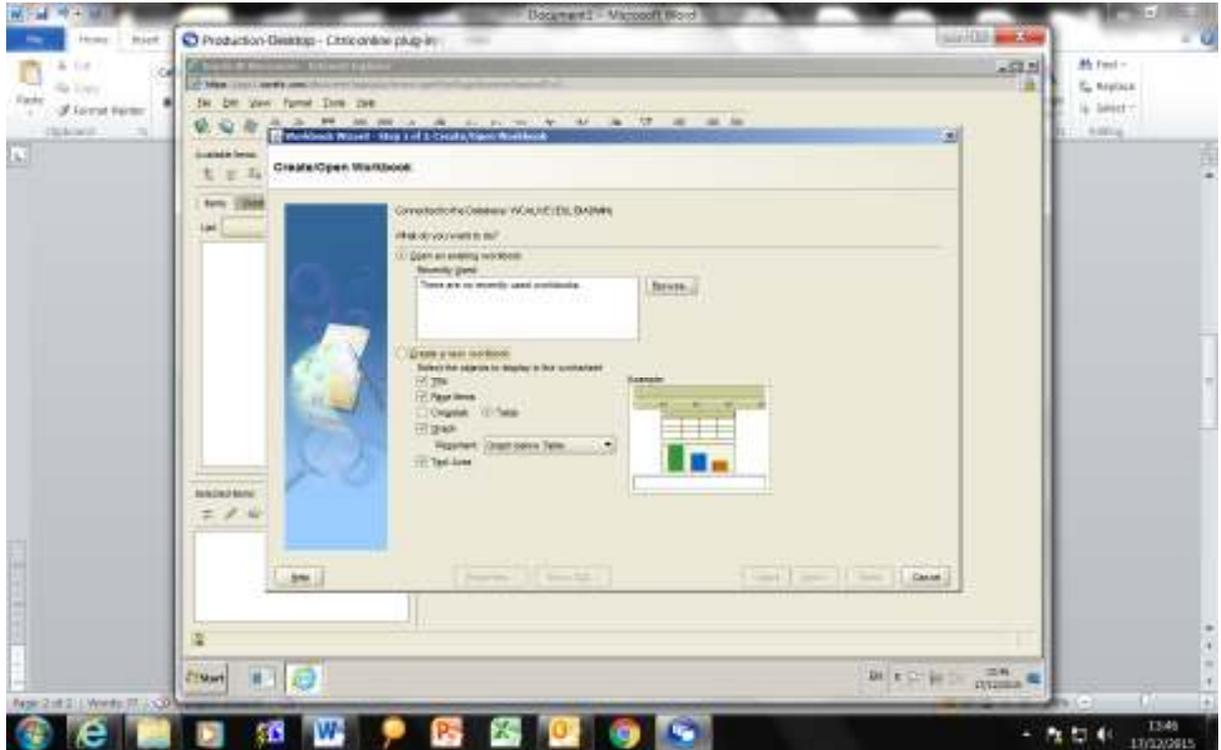
5. SELECT AND OPEN REPORTS

You may be asked

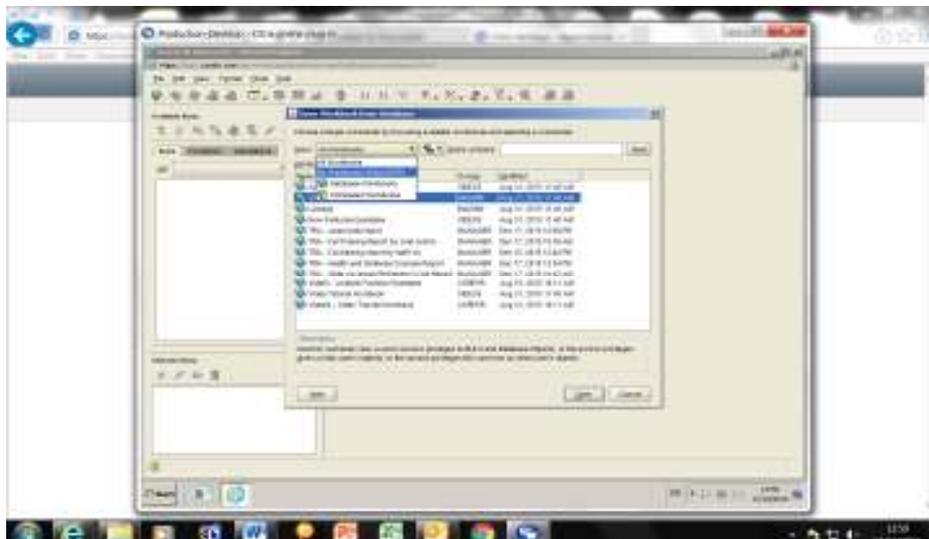
- Do you want to run this application – select RUN
- Do you want to run with the installed version of oracle – select YES

What do you want to do screen will open

6. Select OPEN AN EXISTING WORKBOOK
7. Select BROWSE button



8. View available workbooks
9. Select MY WORKBOOKS – MANAGER
10. Click on the  sign to view the Manager Workbooks saved
11. Select workbook you want to access and select open



TO ACCESS YOUR DATA

TRAINING REPORTS

Training reports start with TRA

Training reports contain an ALL tab and a MANAGER TAB at the bottom of the report

To look at your staff team

12. Select the ALL TAB

13. From the reports to button at the top of the page – select the DOWN ARROW to show the list of managers

14. Select your name from the list and select OK

To look at your data

15. Select the MANAGER TAB

16. You will be asked to enter your 4 digit staff number

17. Select OK

