

C1

Case Study 1 Developing an agency skills matrix

Daley's Place had recently completed a review of all job descriptions and roles in the agency against the competencies from the community services and health training package.

The Executive Director of the agency wanted to complete the matrix prior to developing Daley's Place next strategic plan to help identify future skill development needs for teams and individual staff.

Agency Activities	Designated Job role			
	Management Committee	Manager	Counsellor	Reception/Admin
Administration				
Manage Finances	X	X		
Advocacy	X	X		
Project Management	X	X		X
Partnerships		X	X	
General Administration	X			X
Special Projects				
Media and publicity	X	X		
Community Development				
Client Work				
Assessment		X	X	
Group work		X	X	
Tele. Counselling		X	X	
Advocacy			X	
Referral				
Future Plans				
Family Group Education		X	X	
Outreach				
Health Promotion		X		



This Matrix gives you a clear picture of the skills you need to meet current and future service demands

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Proforma 3 Individual Competency Record

Name: _____

Name of Agency: _____

Attach the Performance Management or Training Plan outlining professional development initiatives and whether they are on the job or off the job.

Unit Number (Individual)	Competency				Workplace Assessor
Elements	Performance Criteria	On Job	Off Job	Date Achieved	Signature/Name
				/ /	
				/ / / / / / / /	
				/ /	

DALEY PLACE Action Learning Plan

Background:

The Management Committee conducted an environmental scan, otherwise referred to as a SWOT (Strength Weaknesses Opportunities and Threats) analysis, as part of their strategic planning day. They identified the following weaknesses within the agency

- High number of inappropriate referrals from other services
 - Increasing number of clients with co-morbidity issues needing crisis assistance
1. Set clear objectives, define issue and set timelines for Action Learning group

Issue Defined:

It was decided to concentrate initially on the issue of inappropriate referrals from other services

Objective:

To develop a strategy for the agency to decrease the number of inappropriate referrals from other services

Timeline: To meet monthly over six months

2. Convene a cross-section of people with a complementary mix of skills from management and clinical streams to participate in the Action Learning group.

Strategy:

Two groups of four people were brought together to be involved in the process. The Management Committee member acted as a facilitator for the process.

3. An initial meeting to analyse the issue and identify actions for resolving them.
The initial meeting included an introductory workshop on action learning, the process and the expected outcomes for the agency. The group discussed the issue on a systems level and then reflected on changing practice within their team or individually to address the issue. In this instance it was agreed that clinical staff would keep a log of inappropriate referrals for a month prior to the action taking place. Strategies would then be put in action, including widening the circulation of the agencies newsletter, and compared to monthly logs of referral patterns. Staff would continue to log inappropriate referrals and be able to make a comparison to assess change after an intervention.
4. Undertake the action learning cycle
Following the initial meeting the group returned to the work place to take action, a subgroup was formed to look at the issue of interagency collaboration. On a monthly basis, the group reconvened to discuss progress, lessons learned, and next steps.
5. Repeat the cycle of action and learning until the problem is resolved or new directions are determined. For Daley place the timeframe was six months with the outcome to be tabled at the Management Committee meeting for further discussion. Strategies centred on internal policy and in house training for staff taking referrals as well as initiatives to build better interagency collaboration.
6. Document the learning process for future reference and record lessons learned after each phase of learning.
Minutes would be taken at each meeting of the group with each participant given a scheduled opportunity to reflect on the action they had put in place prior to a facilitated group discussion to plan the next action. The project was monitored by the facilitator.



Action Learning is a great way to involve staff, build their expertise and as well as a whole of agency approach to a problem.

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Case Study 3 - Staff Swap Policies & Procedures Manuals

DALEY PLACE

Policies and Procedures Manual

Daley Place has a commitment to the professional development of staff. Employees will have the opportunity of building expertise through applying for a staff rotation position and participating in staff swaps with external agencies.

Where swaps or rotation take place between agencies, supervisors and managers will reach agreement as to issues of liability, privacy and other legislative and statutory requirements.

Daley's Place is a outpatient counselling centre. Their client base is predominately young people with dual diagnosis issues. They case manage clients through three regional centres and twenty full time Alcohol and Other Drug workers. Managers decide to offer a staff swap program between the centres as well as an opportunity to work for a day in the mental health agency where most of their clients are referred from.

A number of staff are interested in participating. To help keep track of the staff and build this into their performance agreements, the manager asks the supervisors to set objectives for the staff swaps and discuss the policies and procedures to be followed for the success of the program.

Staff Rotation

- 14.1 Staff will be selected for the position of staff rotation through an internal process similar to that of external recruitment.
- 14.2 The Rotation position created will be coordinated by the staff member's direct supervisor.
- 14.3 The supervisor, staff member and manager of the agency will establish a staff rotation agreement clearly outlining the timeframe, goals and expected outcomes of the rotation.
- 14.4 The process will include appropriate rotations to ensure all involved maintain their core operational competencies at their substantive level.

Staff swaps

- 14.5 Staff swaps will be short term (one to three days)
- 14.6 Where staff swaps are with an external agency the staff members pay and conditions will remain as outlined in their original contract.
- 14.7 Staff swaps are voluntary and can be suggested to management through the staff member, their supervisor or manager.
- 14.8 Staff involved in a swap with an external agency will be entitled to a day or two days orientation in that position prior to the swap.

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Case Study 4 - Freedom House Clinical Supervision



Freedom House is a residential rehabilitation centre based on the therapeutic model in the city of Bloange. It also has an outreach service. It has been operating for ten years and has four full time counselling staff in the residential centre and three part time counselling staff in the outreach service.

A need was identified by staff for clinical supervision. This was an issue especially for university trained staff who work in therapeutic communities and encounter complex pathology eg depression, post traumatic stress and other psychology issues. To minimise burnout and retain staff the manager agreed that supervision was extremely important.

Freedom House offers the following clinical supervision for its staff:

- Individual: External Clinical psychologist for one hour per staff member over a month for seven people.
- Group: Weekly supervision alternating between issues of staff health and issues of clinical governance.

The agency originally planned to hire an internal clinical coordinator who would conduct clinical supervision for all staff, but had difficulty recruiting. The manager and the Board decided to contract the services of two external supervisors and built into this into the budget. The costs for a Clinical Supervisor is around \$125 per hour.

Staff guidelines and operational framework for clinical supervision sessions

An initial meeting was held with staff to discuss clinical supervision and decide on clear goals as well as the parameters and outcomes for the sessions. The following was based on Central Sydney Area Health Service's guidelines for supervision sessions and their content.

Clinical Issues:

- professional behaviour
- boundaries
- ethical considerations and dilemmas
- issues of transference and countertransference
- personal values as they impact on clients

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The content of clinical supervision sessions would remain confidential unless the clinical supervisor suspected or was informed of gross misconduct or behaviour that would be affected by statutory reporting requirements including Child Protection Issues, Domestic Violence etc . As outlined in the clinical supervision policy and contract, where common issues were identified that affected e operation of the agency or training needs were identified, the supervisor would approach the manager with the full knowledge of the staff member. The staff member would be immediately informed that the issue would be reported to their immediate supervisor/manager as outlined in the clinical supervision policy.

Overview of current clinical practice

- Discussion of aspects of cases
- Case presentation
- Alternative approaches
- Skills in report writing and documentation in clinical notes
- Clinical tools

In line with the clinical supervisor's contract, clinical advice would be framed in the therapeutic model. Where the clinical supervisor was unsure of the boundaries the issue would be referred to the Manager (with staff member present to allow for transparent processes

Skills Training

- teaching of skills during supervision
- applying practice to theory in case management
- discussion of further education/short courses
- referral to other staff who have expertise in a specific area

To align with Performance Appraisal processes the clinical supervisor would advise and assist the staff member to raise relevant issues at performance appraisals and to raise issues with you for inclusion in staff work plans.

The role of the staff's immediate supervisor was also be clarified to ensure the roles were well defined in the relationship. These included:

Workload Management (assisting staff to)

- Prioritise work and or work goals
- Arrange a more manageable work load
- Organise work and time more effectively

Organisational Issues (staff aware of)

- organisational constraints
- policies and changes as they impact on the clinical practice
- policies, procedures (eg OH&S) that staff need to be aware of to conduct duties.

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Case Study 4 - Freedom House Clinical Supervision

Example Contract

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PO BOX 4325, Bloange NSW 2244

This contract of employment is made between Freedom House and Clinical Supervisor. The initial term of this contract is six months. There is an option to renew this contract and renegotiate the terms and nature of employment at the end of this period. This option will be subject to mutual agreement between Freedom House and the Clinical Supervisor.

Under this contract Clinical supervisor is to supply Freedom House with fortnightly involvement in the following manner:

WEEK ONE Team Health	One hour group facilitation and clinical supervision for teams, this will be a non directive approach aimed at facilitating or resolving any team issues that arise, mediating any challenges and supporting decision making processes. This time can also be a forum for presentation and discussion of pertinent program and process issues.
WEEK TWO Clinical Governance	A session of clinical and professional supervision or EAP counselling, debriefing, guidance, support, consisting of a forty minute session per team.
INDIVIDUAL	One session for an hour per month per staff member
WEEKLY	Overall consultation to the Manager: Providing feedback and discussion on pertinent program and process issues (30 min to one hour)

The exact allocation of times in these sessions may vary according to prevailing circumstances and will be negotiated with the staff and teams and their supervisors involved in initial consultation. The supervisor will also keep a written record of each session. Monthly supervision will be made available to staff through the direct supervisors to the limit of one session per month.

In return for this service Freedom House will pay Clinical Supervisor on invoice for the sum of \$Z per hour for work completed whilst at the premises or for time involved in telephone consultation where appropriate.

Clinical Supervision will be given in line with Freedom House's clinical supervision policy. Professional indemnity and personal insurance will be the responsibility of clinical supervisor.

Signed

Manager Clinical Supervisor.....

Freedom House

Date Date



Clinical Supervision Policy

The agency should support clinical supervision through internal policies and procedures. A proforma policy for Freedom House can be divided into four key stages:

Excerpt from Policies and Procedures Manual for clinical supervision.

Stage 1 - Structure of Supervision

Stage 2 - Process of Supervision

Stage 3- Record Keeping and Audit

Stage 4 - Standards for Clinical Supervision

Stage 1 - Structure of Supervision

- 1.1** Agreements to participate in clinical supervision will be incorporated into the employment contracts of clinical staff.
- 1.2** Existing clinical staff will agree "contract of clinical supervision" with their supervisors that will be reflected in workplans and performance agreements e.g attendance, frequency.
- 1.3** Each manager will ensure every qualified professional in their sphere of responsibility has been allocated a clinical supervisor.
- 1.4** Each manager will ensure that time is made available for supervision sessions to be held.
- 1.5** In the event of(1.2 to 1.5) not happening the supervisor will be responsible for informing the appropriate manager.
- 1.6** Clinical supervisors will be chosen through a procedure mirroring that of choosing new staff, with selection criteria and an interview process.
- 1.7** Time for supervision sessions must be agreed by both supervisor and supervisee in consultation with their supervisor.
- 1.8** The duration and frequency of clinical supervision sessions must be set within specific time frames as defined in the contract of supervision.



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Stage 2 - Process of Supervision

- 2.1** Clinical supervision sessions will be held in private areas free from extraneous distraction.
- 2.2** Individual supervision sessions will be confidential unless there is a clear concern regarding a possible breach of professional conduct and/or issues which may be detrimental to patient care.
- 2.3** Any continuing concerns regarding standards of clinical practice must be reported to the relevant manager with the FULL KNOWLEDGE OF THE SUPERVISEE.
- 2.4** Situations where clients and/or others are considered to be at risk, must be reported to the appropriate manager/authorities, BY THE SUPERVISOR and immediate action taken. NB: THE WELFARE OF CLIENTS/OTHERS SUPERSEDES ANY CONCERNS REGARDING CONFIDENTIALITY.
- 2.5** The supervision process is dynamic and concerns regarding standards of practice may require ad hoc sessions to be arranged, in between existing agreed ones.
- 2.6** Clinical staff may from time to time require specialist supervision, for specific areas of practice e.g., Behavioural, Psychodynamic etc., where particular skills/knowledge lie outside the remit of the usual supervisor. In such cases it is quite appropriate to seek specialist supervision.

Stage 3- Record Keeping and Audit.

- 3.1** Both supervisor and supervisee must keep a brief record of the overall content of each meeting, including date, time and duration and a short synopsis of any agreed actions. A pro-forma may be devised for such records which must be signed by both parties. Personal details should NOT be included. In the event of group supervision, the group should nominate a scribe.
- 3.2** These records must be kept in a secure environment and may be required by the manager in the event of any future investigations (note 2.3, 2.4).
- 3.3** Any concerns must be reported to the manager and a note to this effect recorded in the supervision files.
- 3.4** Any difficulties arising in the relationship between supervisor and supervisee should be discussed within meetings and recorded.
- 3.5** In the event of continuing difficulties in the supervisor/supervisee relationship either party must inform the appropriate manager for guidance in order to resolve the problem where possible, with the full knowledge of the other party.
- 3.6** An audit of supervision sessions will be carried out six monthly, an audit tool will be devised for this purpose.
- 3.7** Any shortfalls identified by the audit (including reasons) will be reported to the relevant manager and action taken as appropriate.



Stage 4 - Standards for Clinical Supervision

- 4.1** There will be a formalised, agreed contracted regular system of clinical supervision in each area for all grades of staff including health care workers.
- 4.2** Time between each clinical supervision session will be no longer than four weeks.
- 4.3** Clinical supervision will take place in a quiet room free from interruption, the time will be protected (except in emergencies).
- 4.4** A formal contract of clinical supervision will be drawn up, and signed by both parties.
- 4.5** Clinical Supervision will be regularly evaluated by staff.
- 4.6** A record of action agreed will be kept and reviewed and evaluated at the next session. This policy will be subject to review in the light of new developments in clinical practice at periodic intervals and routinely every twelve months.

Excerpt from the Program Manual



The agency is committed to the provision of the highest possible standard of professional supervision for all staff.

- All service providers will receive regular and qualified supervision of their work with clients.
- Supervision will be provided by a suitably qualified and trained members of staff or by external practitioners who have acknowledged expertise in supervision

Procedure

Group

- Supervision sessions are timetabled on a Monday
- No appointments are to be made during this time and all staff are expected to attend as appropriate
- Supervision sessions are facilitated by the clinical supervisor
- The content of the sessions is rotated from team health issues and peer case review
- Supervision methods will include direct observation and process recall supervision

Individual

- Supervision sessions will be scheduled at a time agreed to by the staff member, their supervisor and the clinical supervisor.
- No appointments are to be made during this time and the staff and clinical supervisor is expected to arrange an alternative date in the case of being unable to attend the scheduled time.
- The content of the supervision will be clinical focussed and where additional needs are identified, the supervisor will advise the staff member to discuss this with their immediate supervisor.

Evaluation Form for Staff



Clinical Supervision Evaluation

Clinical Supervision can be evaluated by the Manager:

- Retaining copies of the clinical supervision contracts (as per policy)
- Maintaining records of when clinical supervision had taken place
- Through staff communications, at staff meetings and during appraisal interviews (if in place) and meetings with senior nurses
- Case Management meetings
- As part of annual staff satisfaction survey (see appendix)

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Case Study 4 - Freedom House Clinical Supervision

Evaluation Form for Staff

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Clinical Supervision Evaluation Form for Staff

Thank you for your assistance in evaluating Freedom House's current clinical supervision policies and procedures. The purpose of this evaluation is to measure the level of staff satisfaction and benefit gained with clinical supervision practices in Freedom House. The results are confidential.

1=Strongly Agree, 5=neither agree or disagree, 10=strongly agree

Provides useful feedback

1 2 3 4 5 6 7 8 9 10

Promotes an easy, relaxed feeling in supervision

1 2 3 4 5 6 7 8 9 10

Makes supervision a constructive learning process

1 2 3 4 5 6 7 8 9 10

Provides specific help in areas needing work

1 2 3 4 5 6 7 8 9 10

Addresses issues relevant to current clinical conditions

1 2 3 4 5 6 7 8 9 10

Advises on alternative counselling strategies to be used with clients

1 2 3 4 5 6 7 8 9 10

Focuses on counselling behaviour

1 2 3 4 5 6 7 8 9 10

Encourages using alternative counselling skills

1 2 3 4 5 6 7 8 9 10

Structures supervision appropriately

1 2 3 4 5 6 7 8 9 10

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Emphasised the development of strengths and capabilities

1 2 3 4 5 6 7 8 9 10

Brainstorming solutions, responses and techniques that would be helpful in future counselling situations

1 2 3 4 5 6 7 8 9 10

Involves you in the supervision process

1 2 3 4 5 6 7 8 9 10

Is motivating to help you assess counselling behaviour

1 2 3 4 5 6 7 8 9 10

You believe they are clinically competent

1 2 3 4 5 6 7 8 9 10

Appropriately addresses interpersonal dynamics in the team

1 2 3 4 5 6 7 8 9 10

Encourages expression of opinions, questions and concerns about counselling

1 2 3 4 5 6 7 8 9 10

Prepares you adequately for the next session

1 2 3 4 5 6 7 8 9 10

Provides an opportunity to discuss major difficulties you are facing with clients

1 2 3 4 5 6 7 8 9 10

Challenges you to perceive accurately the thoughts, feelings and goals of the client

1 2 3 4 5 6 7 8 9 10

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Motivates and encourages you

1 2 3 4 5 6 7 8 9 10

Gives you the chance to discuss personal issues as they relate to counselling

1 2 3 4 5 6 7 8 9 10

Is flexible enough to encourage spontaneity and creativity

1 2 3 4 5 6 7 8 9 10

Focuses on the implications and consequences of specific counselling behaviours

1 2 3 4 5 6 7 8 9 10

Provides suggestions for developing counselling skills

1 2 3 4 5 6 7 8 9 10

Encourages the use of new and different techniques

1 2 3 4 5 6 7 8 9 10

Gives useful feedback

1 2 3 4 5 6 7 8 9 10

Helps organise relevant case data in planning goals and strategies with clients

1 2 3 4 5 6 7 8 9 10

Allows and encourages self-evaluation

1 2 3 4 5 6 7 8 9 10

P4

Proforma 4 - Staff Rotation Agreement

Today's date:

To: (Rotation Employee)

Address:

.....

Phone:

Classification:

From: _____

Dept.

Address:

Phone:

Objectives:

.....

.....

Duties:

.....

.....

Schedule:

.....

.....

Length of staff swap/rotation:daysmonths

Start date:End date:

Evaluation Dates: mid-point:conclusion:

Termination:

This assignment may be terminated by any party at any time if circumstances so require. The conditions of the swap/rotation are as outlined in the Policies and Procedures (copy of relevant section attached). Any additional agreements are included in the comments section of this agreement.

Comments and additional agreements:

Sharing/Rotation Employee (signature):Date

Employee's Supervisor (signature):Date:

Employee's Dept. Head (signature):Date:

Sharing/Rotation Supervisor (signature):Date:

Name (print or type):

.....Department:.....

An Alcohol and Other Drug Worker at Freedom House, a residential rehabilitation centre, has recently retired. The following examples are from Freedom House's procedure to recruit a new AOD worker.

Job Advertisement



ALCOHOL AND OTHER DRUGS WORKER

Freedom House - Bloange NSW

A progressive residential rehabilitation centre operating under the therapeutic model, with a small but enthusiastic team, is looking for a qualified AOD Worker with strong interpersonal skills. The main duties of the position are to assess and refer clients and offer ongoing support as a case manager for the six months the clients are residents.

ESSENTIAL CRITERIA

- Relevant AOD Qualifications or sufficient experience to gain Qualifications
- Plan and implement relapse prevention strategies
- At least five years experience in assessing and case managing clients with AOD issues.
- Commitment to harm minimisation strategies
- Commitment to addressing child protection issues.
- Demonstrated knowledge and understanding of EEO and OH&S
- Current drivers license

SACS award, Grade 3 plus fringe benefits including salary sacrifice.

Freedom House is an EEO employer. A relevant criminal record check will be conducted on applicant/s recommended for employment. All employees must abide by a Smoke Free Workplace Policy.

For Applicants Package contact Darley on 02 9698 XXX or email darley@nearly.com.au

Closing Date : Monday 2nd September.

Cover letter for Job Applicants

FREEDOM HOUSE

PO BOX 4325, Blongue NSW 2244

Dear Applicant,

Thank you for expressing interest in the position of Alcohol and Other Drug worker at Freedom House. I have enclosed the following information to help you with your application.

- A job description, including selection criteria
- Organisational Chart
- Freedom House Annual Report for 2002.
- The agencies strategic plan for 2001 - 2005
- A copy of Freedom House's latest monthly newsletter

Your application should contain;

- a curriculum vitae outlining relevant experience and
- the names and contact details of at least two referees.
- it is essential to address each of the selection criteria in your application.

Applications marked confidential should be addressed to David Range at the above address.
Applications close on Friday 20th August, 2003.

If you have any questions about the project or about your suitability for the role, I encourage you to contact me on <phone> or by email on <email>.

Yours sincerely,

Manager
Freedom House

Date

Job Description

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PO BOX 4325, Bloange NSW 2244

ALCOHOL AND OTHER DRUGS WORKER

Job Description

Job Title:	ALCOHOL AND OTHER DRUGS WORKER
Designation:	Bloange Office
Work Unit and location:	AOD workers team, Bloange
Position number:	REF8990
Responsible to:	David Peace, Manager
Probation Period:	3 months
Term of Appointment:	1 year
Type of Employment:	38 hrs per week

Primary Objective

A succinct statement of the Primary Objective of the job

To provide AOD counselling and support services to the clients of Freedom House.

Background and Role of the Position

- Introductory statement about agency*
- Size of team and description of department staff member will be working in*
- Length of contract for position*

28 hrs per week, 12-18 months (Possible Job share and flexible work practices)

Freedom House is a therapeutic community that supports individuals and families to build on their strengths and address alcohol and other drug issues. This position involves developing trusting, co-operative relationships and working collaboratively at the community and interagency level.

The person is responsible for the assessment, admission, discharge, day to day supervision and case management needs of clients in Freedom House's Programs.

The worker should have experience in Alcohol and Other Drug issues particularly as they affect indigenous and young people. The AOD worker will be expected to have, or to be sufficiently experienced to gain, Community Services Certificate IV in Alcohol and Other Drugs. Accredited Workplace Trainer and Assessor qualifications would be advantageous.

Job Description



Key Responsibilities

Avoid Jargon and make these as action orientated as possible. For each key responsibility you can add tasks associated. You can also indicate the amount of time you expect to be spent on each responsibility.

1. Assessment of new clients (typically 20% of job role)
 - Thorough assessment of current status of client including use of standardised drug screens
 - Develop Case Management plans including establishing review and evaluation systems in line with the agency's guidelines.
2. Referral of Clients
 - Service that address the clients needs are identified
3. Case Management activities

Level of Responsibility

For example the position may require maintaining information of a confidential and supervise a number of staff.

This worker is not required to supervise other staff. The worker is expected to participate in the operations of Bloange as a Therapeutic Community and its activities.

Selection criteria

Enter as numbered points under relevant heading of essential or desirable to be used in job advertisement

ESSENTIAL

These describe the minimum level of qualifications for an applicant to be able to perform the essential functions of the job. They include education or degrees, Licensure or certification, and any job-related experience required. These can be based on National Competencies as outlined below.

Job Description

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- Relevant Qualifications (Certificate IV in AOD) or sufficient experience to gain Qualifications
- Minimum 5 years experience as a counsellor in the AOD sector
- Assess the needs of clients who have AOD issues (From National Competency AOD 8)
- Can develop a case management plan for clients (From National Competency AOD 8)
- Work with clients with alcohol and other drug issues, for example develop goal and action plans with clients (From national Competency AOD10).
- Case Management skills
- Plan and implement relapse prevention strategies
- Experience in addressing family and alcohol and other drug issues.
- Commitment to harm minimisation strategies
- Commitment to addressing child protection issues.
- Demonstrated knowledge and understanding of EEO and OH&S
- Current drivers license

DESIRABLE

- Family counselling experience
- Outreach experience
- Provide Interventions to meet the needs of clients with mental health and AOD issues (From National Competency AOD6)

Further Information (optional section: delete if not required)

(Enter in relevant information as numbered points, eg. agency internet site)

Approved:

(Delegated employee to sign original for file).....

(Position of delegated employee)(Date)

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Case Study 5 - Freedom House Recruitment Process

Applicants Score Sheet to select applicants for interview

FREEDOM HOUSE

PO BOX 4325, Bloange NSW 2244

ALCOHOL AND OTHER DRUGS COUNSELLOR/WORKER

SCORE SHEET

	J. Moore	I. Savarou	P. Gallaher	D. Grenfel	Example
Essential					Of 4
From Job Description					2
					1
					4
					3
Desirable					Of 2
From Job Description					1
					.5
					0
Score					11.5
Comment					
Interview	Y / N	Y / N	Y / N	Y / N	Y / N

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Case Study 5 - Freedom House Recruitment Process

Letter of Offer

FREEDOM HOUSE

PO BOX 4325, Bloange NSW 2244

Dear,

I wish to congratulate you on your successful application for the (full time / part time/casual permanent) position of (title). I am pleased to be able to offer you a contract from (date) to (date) with the (name of agency). Please find attached a detailed job description outlining the conditions, duties and award associated with the position.

I invite you to contact me to arrange a time to discuss commencement and to sign the contract of employment and discuss orientation. I look forward to you joining the team at (agency) and am sure you will make a valuable contribution to the (Service).

Yours sincerely,

Signed:

Manager

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Case Study 5 - Freedom House Recruitment Process

Orientation Guidelines

These guidelines provide a checklist for the supervisor and new staff member to check off.

The objectives have been broken down into 4 stages:

Stage 1 - Prior to Commencement

Stage 2 - Welcome to the workplace

Stage 3 - Orientation

Stage 4 - Work planning and development needs

If you have any questions or any suggestions regarding orientation or induction, please contact Training and Development, People Services on 9925 4514 (RMIT).

Stage 1 - Prior to Commencement

Once a candidate has been selected for a position, the agency should be ready for their arrival.

This includes

- Setting up IT (Computer, passwords etc)
- Pay roll (Setting up pay roll system for new employee)
- Orientation Pack

(There may also be other needs unique to your agency you should include)



A good orientation for new staff members lays the foundation for their satisfaction, an opportunity to build a shared understanding of your agencies mission and increase your ability to keep them!

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Objective	Action	✓
The new staff member understands when and where they will be working and their new job role.	Contact the new staff member by phone or send them a letter confirming: <ul style="list-style-type: none"> <input type="checkbox"/> date of commencement <input type="checkbox"/> reporting time <input type="checkbox"/> map of agency and parking details <input type="checkbox"/> (if appropriate), <input type="checkbox"/> who to report to (supervisor's name and location) expected work program on the first day 	
All staff are aware of the starting date and duties of the new staff member.	Send an e-mail or memo notifying co-workers of the new staff member's date of arrival and how their position fits into the department	
The new staff member has a comfortable, safe and sustainable work environment. The appropriate equipment and facilities are available to do their work.	Organise the work area. Ensure the new staff member has a desk, telephone, computer (including relevant software) and stationary as required. The new staff member should also be given a copy, or access to the office keys, email and internet.	
The work program for the new staff member during their first week is clarified. Time is allocated to carry out the induction process.	Plan their work assignments for the first week. Supervisor sets time aside in diary for conducting the induction	
The new staff member meets all relevant staff in their first week.	Book time with the supervisor's manager and other relevant staff. Further checklist can be developed of the relevant staff they should meet. This can also include external agencies.	
Stage 2 - Welcome (the first day)		
The new staff member is welcomed and meets staff in the local work area. The new staff member understands the role of work colleagues and the link to their role	Introduce new staff member to team. Organise morning tea to welcome the new staff member Tour of agency and explanation of agency structure, including a brief description of each staff member's role. Provide new staff member with 'New Starters Kit'	

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Objective	Action	✓
The new staff member is able to locate all relevant facilities.	Tour of facilities including; <ul style="list-style-type: none"> <input type="checkbox"/> Location of toilets/showers <input type="checkbox"/> Tea and coffee facilities <input type="checkbox"/> Nearby lunch outlets <input type="checkbox"/> Relevant meeting rooms <input type="checkbox"/> Emergency exits 	
The staff member understands what their job entails	Provide a detailed explanation of position description in the context of the department and the overall environment.	
The staff member knows how to use the agencies communication systems	Demonstrate: Fax and phone systems (include relevant password codes or procedures for STD, ISD phonecalls) E-mail	
The new staff member understands their rights, responsibilities and conditions of employment	Explanation provided on: <ul style="list-style-type: none"> <input type="checkbox"/> Work conditions (flexible work arrangements etc) <input type="checkbox"/> Leave entitlements and process for applying for leave <input type="checkbox"/> Procedure for reporting absences <input type="checkbox"/> Code of ethics (appropriate conduct) <input type="checkbox"/> Equal Employment Opportunity policies (including discrimination and sexual harassment). <input type="checkbox"/> Superannuation entitlements 	
Stage 3 - Orientation to agency, the first two weeks		
The new staff member is familiar with the: Mission and Strategic directions of the agency	Enter the date of the next 'Welcoming Event' into the new staff member's diary Discuss content of the Strategic Plan with the new staff member (copy in 'New Starters Kit')	
The new staff member is able to operate computer systems and communication.	Provide training in the use of the Local Network including: Software packages, e.g. Microsoft Office	
The new staff member knows how to obtain equipment or supplies necessary to do their job.	Ordering of supplies and equipment (technical and stationary). Obtaining files from filing system Travel and vehicle acquisition	
The new staff member understands their occupational health and safety responsibilities and those of the agency.	Provide information, training and supervision to new staff members, which will enable them to work in a manner that is safe and without risk to health. Advise new staff member on local emergency procedure procedures. Identify five fire wardens, first aid representatives and Health and Safety Representatives within the agency.	

Guiding the new staff member through the first 3 months

Objective	Action	✓
The new staff member is aware of the networks, especially those relevant to their position	Inform new staff member of professional employee groups e.g. Interagency networks, Area Forums and other professional meetings	
The staff member is able to attend and participate in relevant meetings	Pencil meetings into the staff member's diary and explain the purpose of each meeting.	
The training needs of the new staff member are identified.	Conduct training needs analysis Identify any training and development strategies for the new staff member necessary to maximise their job performance.	
The staff member understands their responsibilities and job performance targets.	Draft work plan developed	

Stage 4 - Work Planning and Development

From 3 - 12 months and ongoing

Objective	Action	✓
Professional development needs and opportunities are identified for the new staff member.	Identify various training and development options e.g. short courses, accredited courses, internal options. Identify relevant seminars and conferences	
Review duties and responsibilities to ensure they are still appropriate.	Look at work plan and assess it in terms of it being realistic and functional	

Checklist

You can include in the orientation process a checklist where the new staff member is required to visit and speak to key people in the agency as below.

Please complete the following checklist within a month. After you have completed the checklist please set a time to discuss this with your supervisor.

Staff Member	Dates Seen	Main Points Discussed
Executive Director	19 March 2003	Strategic Plan Management Committee
Board of Directors Rep		
Clinical Supervisor		
Receptionist		
Office Manager		
Training Officer		
IT Manager		
Area Health Service Non Government representative		

Example work plan for new staff member

Responsibilities: Client Assessment and Referral				
Objectives				
Team leader to review and evaluate current assessment and referral practices and advise on best practices for the agency and develop resources to support this in consultation with other staff by December 2002.				
Activity	Tasks	Deadline	Partners	Resources Needed
Assess New Clients	Assessment and Referral protocols of agency	Seven Days from referral to the agency	AOD workers team	
Referral of clients	Monitoring of referred clients	Follow up a week after referral made	Referral agencies	
New Assessment forms	Update assessment forms Train staff in use of new forms	October 2002		
Trial skills from Case Management Training	Supervisor to assist with developing case management plan	December 2002		

Example work plan for new staff member

- Responsibility:* The responsibility or key result area is intended to link the job description with the specific performance objectives. They represent the major areas which the employee will focus.
- Objective:* Defines the objectives for the next work period (generally 6 months). The objectives should be specific, realistic and time bound. They should answer the who, why, what, when and where questions.
- Activity:* A brief description of the main activities required to meet the objective
- Tasks:* Breaking down the activity into smaller work units and these become the key indicators in meeting the goal.

C6

Case Study 6 - Grievance and Discipline Procedures

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Grievance and Discipline Procedures

Grievance Procedures

Subject to the provisions of the relevant section of the Australian Industrial Relations Act, any dispute or claim arising between the parties or between the employer and an employee should be dealt with in the following manner.

As soon as is practicable after the dispute or claim has arisen, the employee concerned will take the matter up with his or her immediate supervisor affording him or her the opportunity to remedy the cause of the dispute or claim.

Where any such attempts at settlement have failed, or where the dispute or claim is of such a nature that a direct discussion between the employee and his or her supervisor would be inappropriate, the employee may take the matter to the CEO for resolution.

The parties to the dispute may by agreement elect to involve a third and agreed independent party to assist in the resolving of the dispute.

If the grievance or claim remains unresolved the member of staff may request the CEO to draw the grievance to the attention of the Board for its consideration and determination. The Board may appoint a mediator to assist it in resolving the grievance. (See Board Policy on Roles and Responsibility in the Management of Conflict, and Communication of the Issues to the Board)

Without prejudice to either party, work should continue in accordance with this agreement while the matters in dispute are being settled, except where it is dangerous to do so.

Should the matter not be resolved, either party may refer the matter to the Australian Industrial Relations Commission for final resolution.

All meetings will be clearly minuted and documentation dated. These will be kept in a confidential file (separate to the employees file).

Disciplinary Procedures

The following procedure will be applied where the employer considers an employee is not satisfactorily performing his or her duties or for reason of alleged misconduct.

The supervisor should decide the seriousness of the concern and may approach the employee informally. In the event of further action this meeting will not be considered as part of the disciplinary procedure. All correspondence and records of meetings during the procedure will be kept in a confidential file.



A good orientation for new staff members lays the foundation for their satisfaction, an opportunity to build a shared understanding of your agencies mission and increase your ability to keep them!

C6

Stage One

The employee will be notified formally in a meeting with concerns outlined in writing in the first instance by immediate supervisor. The employee should be given adequate notice of the meeting and be informed they can bring a support person to the meeting (a friend, family member or union representative).

During the meeting it will be clearly spelled out to the employee how and why their work performance or behaviour is unsatisfactory with suggestions to remedy the situation should be discussed and agreed. The employee must be allowed adequate time to respond to the issue/s and contribute to the solutions.

A time frame in which discernible improvement should take place should also be agreed. Details of the meeting should be recorded, agreed to and signed by all parties present.

Stage Two

If the employee's performance or behaviour does not reach an agreed satisfactory level after the agreed time has lapsed, the employee will be given written notice listing the continuing problems which clearly outlines why this is not acceptable in the agency.

The notice will be from the relevant manager and must be placed on the employee's personal file. A second meeting will be scheduled where the employee must be given an opportunity to explain why his/her performance or behaviour has not improved and can bring a support person. At this meeting it must be clearly outlined that if there is not an improvement in performance or change in behaviour then there may be further disciplinary action that could lead to termination.

Again, an agreed time frame within which the employee's performance or behaviour must improve must be agreed and the details of the meeting will be signed by participants and placed in the employee file. The employee can comment in writing to the supervisor if they do not agree this to be a true record of the meeting.

Stage Three

Should the employee's performance or behaviour not improve by that time a final written warning shall be issued, and a meeting held to explained to the employee that should the problems which led to the warnings not be rectified by the specified date the employee shall face disciplinary action, which may include a reduction in salary, demotion, withholding an increment, or dismissal (to be specified clearly in the warning).

The Employee at this stage should be made aware of counselling and arbitration options available to them.

A staff member may lodge an appeal to the CEO, or if the CEO is the supervisor to the Executive, which may wish to establish a committee to review the documents and process. Where the CEO feels further investigation is warranted a Disciplinary Committee will be established with an independent representative (may be from peak body or outside of immediate department). During this committee concerns are outlined which were raised in the letter to the CEO. The committee will decide on further fact finding required (interview other staff, documentation etc) and compile a final report for the Board of Directors. The Board will meet to decide on the action to be taken.

The Employee will be notified in writing of the outcome of the Board Meeting which may include dismissal. The level of action depends on the seriousness of the breach or series of breaches of policies and standards, whether the person knew what they were doing and intended to do it, whether the person has been counselled or officially warned before and the circumstances that mean the person should not be disciplined.

C6

If the employee is still not satisfied he/she can appeal to the relevant external agency

- NSW Australian Industrial Relations Commission
- NSW Anti-discrimination Board.
- Government and Related Employees Appeal Tribunal
- Independent Commission for Corruption

Misconduct

Misconduct which includes neglect of duty, malicious damage of employer's property, assault, or theft, is a single act which may lead to summary or instant dismissal.

Such conduct should be documented and brought to the attention of the Chief Executive Officer immediately. He/she will be responsible for making all subsequent decisions on the matter.

The onus of proof will be on the employer to prove that the conduct concerned is sufficiently serious to justify instant dismissal. If such an instance takes place it should be immediately investigated by the employer, with the employee being given an opportunity to put his/her case in answer to any allegations.

In all cases of misconduct the supervisor or relevant manager shall document all relevant details. In the case of instant dismissal, the dismissal should be conducted in the presence of a workplace representative, and the dismissal must also be provided in writing.

Any disciplinary action must be carried out fairly and in a non-discriminatory manner. In considering each case a person's employment record, years of service and other relevant material, must be taken into account. The above disciplinary procedure does not affect the employee's right to have the matter dealt with by the Australian Industrial Relations Commission.

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Grievance and Discipline Policy

Discipline

Where the actions of any staff member or member of the management committee come under a statutory requirement to notify an external agency this will be undertaken with full knowledge of the relevant employee, eg Law Enforcement or Department of Community Services in regards to Child Protection Issues.

All employees, contractors and volunteers must perform their work in a timely professional and cooperative way to the best of their ability. This partial list is representative but not all-inclusive of conditions or behaviour/performance problems that could result in a disciplinary procedure:

- Tardiness
- Unauthorized absence from job or work area
- Abusive or derogatory language
- Violation of safety procedures
- Inappropriate/improper use of property
- Not carrying out assigned duties

Disciplinary action will be taken here reasonable attempts at counselling, training and guidance have failed to bring a persons work performance to an acceptable level.

Concerns about work performance or behaviour will be resolved confidentially, fairly and at the most immediate level possible in a timely manner.

Anyone involved in the process may not be victimised or targeted in any way. Victimisation if proven will be disciplined.

Confidentiality is essential and breeches of confidentiality, if proven, will be disciplined.

Grievance

The Grievances procedures will be followed under the following principles;

- fair, impartial, just and confidential handling of concerns and grievances;
- action is taken promptly within agreed timeframes and procedures;
- parties are protected from victimisation; and
- the system provides employees with a choice of procedures.

Where a Grievance is raised during a disciplinary process, the grievance needs to be finalised but the disciplinary process should continue independently."

P5

Proforma 5 - Performance and Development Review

STAFF PERFORMANCE AND DEVELOPMENT REVIEW

Staff person:

Position:

Review Period:

Reviewer:

Date:

Signed:

SECTION ONE: Review by Competency

Assess the effectiveness of the employee against the key competencies, and elements of these, for the position.

Competency	Competent	More Development Needed
Eg Assessment of clients		

MANAGERS COMMENTS:

P5

SECTION TWO - Review by Workplan

Assess the level of achievement of the employee against their work plan over the review period and then mark the performance rating which best describes the employee's performance.

Work Plan Area	Highly Achieved	Achieved	Mostly Achieved	More Development Needed

MANAGERS COMMENTS:

P5

SECTION THREE - Planning Discussion

For the purposes of professional development, this discussion seeks to identify the skills, knowledge and abilities relevant to your position and then moved to nominate areas for development of these.

Work Plan Area	Skills, Knowledge, Abilities	Areas for Development

COMMENTS:

(Further definitions may be needed to clarify)

P5

SECTION FOUR - Development Planning (July to December 2002)

The section follows from the previous section and seeks to identify the processes and specific plans for your professional development.

Work Plan Area	Development Plan	Target Dates

P6

Proforma 6 - Staff Satisfaction Survey

The staff satisfaction survey is completely confidential. Please return to the "Return Survey" box in the staff room before the 12th October. The results of the surveys will be collated and used at the next strategic planning meeting to develop strategies to address staff concerns.

Length of Time Employed at this agency (please tick one)

- Less Than One Year
- One to Three Years
- Three to Five Years
- Five to seven Years
- Seven to Ten years
- Ten Years or more

Job Satisfaction

Management encourage you to make decisions and use your own judgement

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

You feel the level of challenge found in your job

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

You feel your knowledge of the agencies vision and goals is

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

Your satisfaction with working here is

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

Your overall sense of job security is

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

Your satisfaction with the physical work environment is (eg adequate space)

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

I feel adequately consulted about management issues that affect my job

Yes	Sometimes	No
-----	-----------	----

The Environment

You think the overall attitude of employees is

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

You feel the level of support from superiors is

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

P6

You feel the level of treatment and care provided to patients is

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

Is the agency better to work for then a year ago?

1	2	3	4	5
Definitely No	Probably no	No Change	Probably yes	Definitely Yes

You feel management act in a fair and consistent manner

1	2	3	4	5
Never	Seldom	Regularly	Often	Always

You feel management encourage openness and a relaxed friendly environment

1	2	3	4	5
Never	Seldom	Regularly	Often	Always

Staff meetings are beneficial

1	2	3	4	5
Never	Seldom	Regularly	Often	Always

Other staff members have adequate equipment and training to do their jobs

1	2	3	4	5
Strongly Agree		Strongly Disagree		

Professional Development

Opportunity for you to develop more skills on the job

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

You have access to educational programs

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

There is opportunity for you to advance your career goals in the agency

1	2	3	4	5
Poor	Fair	Good	Very Good	Excellent

You feel management encourage provide access to adequate supervision

1	2	3	4	5
Never	Seldom	Regularly	Often	Always

I have the skills, knowledge and training needed for my job

- Yes
- No

Thank you for your time in completing the survey. If you have any questions please do not hesitate to talk to your supervisor or _____ on Tel:

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Strategic Plan

SECTION TEN: Workforce Development

Goal: To ensure all staff have access to ongoing professional development in order to maintain a high quality of service provision.

Initiative	Performance Indicator	Timeline	Responsibility
Strategy 1: Develop a system of regular professional updates for the professional development of staff			
Develop fortnightly in-house professional update meetings for clinical and non clinical staff	As part of the annual planning day with staff develop a list of topics to be covered.	October	David Relled, Manager Education and Training
	In-house calendar developed	November	
	Speakers found for topics through networks (including email lists)	December	
	Investigate partnering with other AOD agencies to share resources and speakers	Ongoing	
Develop a system of clinical supervision	Develop contracts for supervisor in negotiation with management committee and staff.	November	Larry Beard, Clinical Team Coordinator
	Source and employ clinical supervisor	January	
	Develop regular review mechanisms	January	
Develop a system of clinical supervision	Develop contracts for supervisor in negotiation with management committee and staff.	November	Larry Beard, Clinical Team Coordinator
	Source and employ clinical supervisor	January	
	Develop regular review mechanisms	January	

Initiative	Performance Indicator	Timeline	Responsibility
Strategy 2: Staff have the skills and knowledge required for their positions			
Skills Audit conducted	<p>Job Descriptions Reviewed and matched to national competencies and other requirements of job</p> <p>Skills audits conducted and appropriate model of workplace assessors decided</p> <p>Managers made aware of flexible delivery options of competency based training</p> <p>Training plans developed for staff and teams to acquire skills</p> <p>Budget developed and considered by Management committee</p>	<p>January</p> <p>February</p> <p>February</p>	Team Leaders
Strategy 3: Staff are supported in building professional knowledge through networks			
Staff Rotation	Staff rotation system investigated with Area Health Service	March	Management Committee and Executive Officer
Attendance at meetings	<p>Staff will regularly on a rotation basis attend local interagency committees and meetings.</p> <p>Meetings Identified Rotation Schedule developed</p>	<p>October</p> <p>October</p>	Executive Officer
Access to professional updates	<p>A library of resources will be established</p> <p>The maintenance of the library will be discussed and a model developed</p>	<p>January</p> <p>January</p>	Team Leader Meeting Executive Officer

To make sure that this process lives beyond your role as the manager or the life of the business plan, you could consider developing a memorandum of Understanding (MOU) with your partner agencies. The following MOU was based on a need to assist managers of Freedom House with workforce development strategies through joint planning and information sharing.



Preamble

A Memorandum of Understanding is a framework for cooperation signed by participants. It is a voluntary agreement, entered into by organisations prepared to be both pioneers and active participants in developing consensus on issues of common interest. While there are no legal obligations to respect the agreement, the signature on a MOU represents a public commitment to respect certain principles and to work towards specific common goals and consensus in specific areas.

In Regards to this particular MOU, the parties agree to work in collaboration wherever possible to improve the professional development of their staff and workforce development systems of their agencies. This MOU will address the basic relationships, roles and responsibilities of the parties but leaves for later agreement the more precise terms that will constitute the substance of the partnership

Background/Introduction

This section answers the following questions

- *Who:* The agencies involved.
- *When:* The time frame and the date of inception.
- *Why:* describe the issue that lead to the MOU.
- *What:* A brief description of underlying principles and the general aims of the MOU.
- *Definition:* Explanation of any acronyms or agencies mentioned in the MOU.

Background

Freedom House and Dugart Mental Health Services have embarked on a 12 month workforce development project in Southern NSW to improve services to co-morbid clients through strengthening and formalising existing partnerships.

This MOU will formalise this understanding between Freedom House and Dugart as well as look at sustainable collaboration around management support and workforce development strategies. The agreement will begin from the date of the first meeting on the 1 March 2003 and will be reviewed regularly at 6 month intervals.

C9

The Issue

- ❑ There has been an increasing focus on quality, best practice and accreditation for NGOs by funding bodies in the area of co-morbidity.
- ❑ Non Government Agencies are under increasing pressure to maintain skills and attract qualified personnel in a sector which is unable to offer competitive salary packages. Workforce development becomes an issue with existing staff, especially in regards to the levels of resources available to commit to this activity)

Underlying Principles

- ❑ The parties will demonstrate their commitment to the process of collaborative partnerships
- ❑ The agreement will support and enhance its partners health service provision
- ❑ The partners will seek to gain maximum value from existing resources, skills and networks

Aims and Goals

To establish a regular forum for Managers of Freedom House and Dugart to meet regularly and discuss improving services to co-morbid clients presenting at each of the agencies. The outcomes of the meetings will include:

- ❑ Establish a Local Co-morbidity Committee; with representatives from other relevant agencies to meet quarterly t discuss service delivery issues.
- ❑ Set up a working party to develop streamlined admission policies for both agencies and informed referrals;
- ❑ Opportunity to build knowledge of staff in the area of the other agencies expertise through arranging staff placements between the two agencies and lending skills for in-house training opportunities.



The Agreement

This section outlines the major outcomes to be achieved from the agreement.

The parties agree to meet monthly to establish and support a joint planning process to contribute to each other's workforce development. The parties agree to pursue a range of integrated activities as outlined in the Aims and Goals.

Specific Activities 2003/2004

1. Partnership

The parties agree to establish a Local Co-morbidity Committee (LCC), which has Management level representatives of both agencies, other invited agencies, and calls on specific staff from within the agencies as required.

Through the LCC parties will have a reciprocal agreement where each will actively advise on and participate on:

- Development and delivery of related learning and development programs.
- Strategic Planning, specifically in the provision of in-house training and professional development.
- Discussion of special projects including streamlined admission policies and informed referrals.

The LCC will also provide a Forum where Annual business plans are discussed and exchanged.

3. Workforce Development

- The parties will plan procedures for cross orientation of new staff members.
- The parties will investigate the capacity of providing clinical supervision and possibility of staff swaps between agencies.

2. Training

- Each agency will be informed of, and invited to attend training provided by the other participating agency and visa versa. Training will be provided at the same level of cost as to the originating agency staff.
- In regards to Mandatory Training (First Aid, OH&S) it will be negotiated jointly where timely and possible, to be more cost effective.
- Both Agencies will offer the services of its staff in assisting with in-house training.



Operations

This section should outline the responsibilities of the agency to the agreement, both individually and as a partnership. It should also outline operational agreement and processes if the MOU centres on service provision agreement, how regular meetings will support this initiative. The issue of conflict management and resolution should be addressed.

Responsibility

- All parties agreed that issues regarding use of administrative, human and financial resources will be negotiated between the Freedom House and Dugart.
- Both parties agree to provide progress reports to their respective management during the course of the MOU.
- All communications, ie correspondence, in relation to the Agreement, should be kept to assist with evaluation
- The agreement will be reviewed annually, or prior to this if either party has serious cause to request an earlier revision.

Conflict Management

In case of dispute in relation to this agreement, signature parties will hold a special meeting to discuss the MOU.

Confidentiality Protocol

The partners and their staff to this agreement recognise the statutory and ethical duties of confidentiality.

Termination

Either Party to this agreement may terminate this MOU by giving 14 days notice in writing.

Review

The MOU is to be reviewed at a regular 6 monthly interval against progress towards the agreed aims and goals by the parties in the agreement against the agreed aims and specific activities.

Agreed to on _____ (date)

by:

.....

Manager 1

.....

Manager 2