

## 9.10 SAMPLE ORIENTATION, EDUCATION & WORKFORCE DEVELOPMENT POLICY

(See MT TX FP Administrative Manual, Policy 4.3, *Training and Technical Assistance*)

**Policy:** Staff orientation and training are an essential component of the family planning program. The family planning program will provide orientation for all new employees within 30 days of hire to program policies and procedures, ensuring that existing staff will receive education and training on updated and/or revised policies and procedures; promote and provide staff access to education and training opportunities and participate in the recruitment, retention and workforce development of agency staff. All this is to enhance the personal educational development of the family planning program staff and improve department quality through continuous educational experiences.

All orientation, education and training events must be included in the staff training log.

### Procedure:

#### 1. Orientation

- a. The Director and/or Supervisor will be notified when a recommended and approved applicant has been hired as a new employee. The employment start date, orientation date and time will be provided to the department supervisor.
- b. The employee will begin orientation at the family planning program on their initial day of employment.
- c. The supervisor and/or the director for the employee's division will begin the departmental orientation and an orientation schedule for the employee. Each supervisor will be responsible for maintaining orientation checklists for each employee that they supervise.
- d. The employee must complete the Title X Family Planning Orientation Checklist and sign an acknowledgement statement within 30 days of hire. (see MT TX FP Administrative Manual, Policy 9.11, *Sample Orientation Checklist and Acknowledgment Statement*).
- e. The quality improvement coordinator will be responsible for developing and maintaining the orientation policy and manual for family planning program staff. The quality improvement coordinator will work with each supervisor in development, revision and update of orientation forms, checklists, and manual content. Current orientation checklists are attached below.
- f. Materials assigned to employees for use during their employment will be returned to the quality improvement coordinator and/or their supervisor as determined by each division's policies upon resignation, retirement or termination.

#### 2. Orientation Procedure

- a. Each new employee shall meet with the Director and/or Supervisor to receive the orientation packet that highlights services and general workplace policies and procedures.
- b. Each new employee must receive the orientation packet the first day of employment.
- c. Each agency presenter shall prepare his/her presentation specific to his/her program/function and shall address public health laws and rules pertinent to respective programs.
- d. Each new employee shall be responsible for attending the overviews at the scheduled date and time reflected on the overview calendar.
- e. Each presenter shall place priority on availability for his/her respective overview appointment.
- f. In the event, it is necessary for a presenter to be absent; it shall be the new employee's responsibility to reschedule the overview appointment.

- g. During each presentation, each employee shall be given an opportunity to ask questions to ensure the employee understands of each program and how it relates to agency goals.
  - h. Each presenter shall date and initial the employee's overview calendar as appropriate to verify employee's completion of overview.
  - i. Once the new employee attends all overviews, it shall be his/her responsibility to submit the orientation record verifying attendance to the Director for filing in his/her respective personnel folder.
  - j. The immediate supervisor shall evaluate skills of new staff and plan an additional orientation that may be needed to meet needs relative to the specific position.
- 3. Education and Training**
- a. Employees will attend state trainings that are required to meet minimum educational requirements for the position held. Required training will be attended within the timelines required by the state or as soon as possible when the training is delayed at the state level.
  - b. The family planning program will maintain budget lines within program budgets to support and assist staff with state and licensure requirements. However, the family planning program does not assume total responsibility for the cost of scheduling of all required continuing education. Staff will work with their supervisor(s) to schedule and attend educational and training opportunities that support the requirements of the position they hold at the department. Supervisors will enlist staff suggestions for training and in-service needs and will work to provide on-site training when appropriate and possible. Staff members are individually responsible for assuring they meet or exceed license renewal requirements throughout their licensing period, not just prior to renewal.
- 4. Workforce Development**
- a. During the annual performance appraisal, supervisors and employees are responsible for working together to identify the employee's workforce development plan for the upcoming year. The plan may include new state of federal training requirements related to the position held, continuing education specific to enhanced role or licensing requirements, and or areas identified by the employee and/or supervisor(s) where knowledge and/or skill improvement is needed to desired. Areas identified in the workforce development plan will be priority areas for family planning program budgetary support.
- 5. Workforce Development/Training Procedure**
- a. Supervisors shall be responsible for developing a recommended training plan for members of his/her staff and for discussing the plan with respective division director for approval and incorporation into the total agency plan, including the budget.
  - b. Selection of offerings shall be based on relevance of the topic, availability of funds, faculty and sponsoring group, continuing education credit offered and adequate staff coverage.
  - c. Specific criteria for selection of individuals based on need, previous contribution and potential shall be as follows:
    - i. Required training
    - ii. Job skills
    - iii. Demonstrated interest and potential for developing in a specific are of training
    - iv. Plan and commitment by the agency and employee to function in the area of training
    - v. Demonstrated interest in professional growth
    - vi. Anticipated tenure
    - vii. Reasonable distribution of responsibilities
    - viii. Willingness to share in the cost and time of training, if necessary

- d. Requests for workshops, educational conferences and meetings should be submitted with an agenda of the educational offering to the employee's supervisor.
- e. The supervisor will evaluate the request, approve or deny and route accordingly.
- f. Supervisors shall be responsible for remaining abreast of any changes in laws or policy that will necessitate additional training of staff.
- g. Supervisors and employees shall be responsible for identifying the availability of specific educational opportunities.
- h. Individual training needs shall be reviewed at least annually at the time of employee performance evaluation.

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