

# FTE calculation workshops outline

## There are 15 workshops available on the FTE calculation

Table 1 provides an outline of workshops that are available on the FTE calculation. Each workshop builds on previous knowledge and embeds the process.

## The workshops facilitate engagement and transparency

The purpose of the FTE calculation workshops are to facilitate:

- Common knowledge and understanding
- Engagement and transparency
- Role model the process for success
- Completion of one or more FTE calculations

## The workshops can be customised

It is expected that the workshops are customised to the individual/group needs. For example face to face coaching sessions may be changed to teleconferences. The degree of customisation will depend on whether:

- The CCDM council and/or working group is new to FTE calculations or needs a refresher
- There are new personnel in the teams
- There are key stakeholders that need greater knowledge/understanding
- There has been significant change to CCDM or DHB tools or processes
- The benefits of the workshop outweigh the costs
- All recommended personnel are available on the same dates
- The workshops can be effectively delivered by other modes

If partners are unable to attend a delay in the process may occur.

## The workshops are designed to build capability and achieve independence

The workshops can be delivered in block sessions (e.g. two or more sessions together), or individually, delivered weekly or fortnightly. The workshops are most effective when they are:

- Provided just in time i.e. as close to actually completing the FTE calculation/s, as possible.
- Presented in the order outlined in the Table 1 (as each session builds on the previous).
- Scheduled at reasonably frequent intervals so that knowledge is retained and transferred from one session to the next.

## The FTE working group and TrendCare quality checks should be in place first

- TrendCare data quality checks should be undertaken prior to booking dates for the workshops. This is to ensure training is not undertaken only to find the data does not meet a standard to proceed to FTE calculation.
- The FTE calculation workshops assume that the FTE working group has been convened. It also assumes the membership as per the CCDM Programme terms of reference for FTE working groups.

Table 1 – FTE calculation workshop outline

Workshop	Delivery mode	Recommended audience	Estimated time	Content
<b>1. FTE working group terms of reference</b>	Guided discussion on the roles & responsibilities of the FTE calculation working group.	FTE working group	1 hour	<ul style="list-style-type: none"> <li>Roles and responsibilities of the FTE working group.</li> </ul>
<b>2. FTE calculation – introduction</b>	Power point presentation	FTE working group CNM/CMM Service managers/nursing leaders Management accounts Health unions	1 hour	<ul style="list-style-type: none"> <li>An overview of FTE calculation components</li> </ul>
<b>3. FTE calculation stocktake</b>	Workshop on how to use the stocktake tool	CCDM Site Coordinator CNM/CMM	1 hour	<ul style="list-style-type: none"> <li>Navigating the tabs</li> <li>Populating the information</li> <li>Scoring and using the decision making matrix</li> </ul>
<b>4. FTE calculation – detailed guide</b>	Power point presentation	FTE working group	1.5 hours	<ul style="list-style-type: none"> <li>Detailed presentation that builds on the Introduction.</li> <li>Includes more information about TrendCare quality checks, available staffing hours and calculation of the final FTE.</li> </ul>
<b>5. Stocktake findings &amp; implementation options</b>	Guided discussion	FTE working group	1 hour	<ul style="list-style-type: none"> <li>Review the stocktake findings</li> <li>Understand what impact this has on the FTE calculation/s</li> <li>Review options for implementing FTE calculations based on the stocktake findings</li> <li>Agree recommendations for the CCDM council</li> </ul>
<b>6. Assumption &amp; calculations</b>	Guided discussion on the assumptions & calculations to be used for the FTE calculations	FTE working group	1.5 hours	<ul style="list-style-type: none"> <li>Understanding the assumptions</li> <li>Agreeing the data sources and how the calculations are to be performed</li> <li>Agreeing principles for roster testing, communication, FTE sign off i.e. standard operating procedures</li> </ul>

Workshop	Delivery mode	Recommended audience	Estimated time	Content
<b>7. FTE calculation data request schedule</b>	Workshop on how to navigate and use the data request schedule. On site or teleconference (limit 2-3 people).	Person responsible for populating the data request schedule. May include one or more of the following: <ul style="list-style-type: none"> <li>– CCDM site coordinator</li> <li>– Management accountant</li> <li>– Service manager / nursing leader</li> </ul>	1 hour	<ul style="list-style-type: none"> <li>• An overview of the purpose, layout and use of the FTE data request schedule.</li> <li>• Includes calculation of available staffing hours.</li> </ul>
<b>8. FTE calculation data for entry into software</b>	Guided discussion on agreeing the data before entry into the software	FTE working group	1 hour	<ul style="list-style-type: none"> <li>• Review of key data inputs</li> <li>• Discussion of implications of data inputs on FTE results</li> <li>• Agreement on numbers for entry into the software</li> </ul>
<b>9. Software demonstration</b>	Software demonstration showing features & functionality.	FTE working group	1 hour	<ul style="list-style-type: none"> <li>• Demonstration of software TEST environment to show layout, tabs, data requirements and functionality.</li> </ul>
<b>10. Software data entry training</b>	Workshop on how to enter data into the software. On site or teleconference (limit 2-3 people).	Person/s responsible for entering data into the software. May include one or more of the following: <ul style="list-style-type: none"> <li>– CCDM Site Coordinator</li> <li>– Management accountant</li> <li>– Service manager/nursing leaders</li> </ul>	1 hour	<ul style="list-style-type: none"> <li>• Demonstration of data entry into the LIVE software using TrendCare data.</li> <li>• The working group (or equivalent) must agree the data inputs, preferably prior to input into the software.</li> </ul>
<b>11. FTE calculation checklist</b>	Guided discussion on how to use the FTE calculation checklist. On site or by teleconference.	CCDM Site Coordinator	1 hour	<ul style="list-style-type: none"> <li>• Introduction to the FTE calculation checklist.</li> <li>• Demonstration of layout, tabs and functionality.</li> <li>• Discussion about exception reporting and describing the impact of exception on the roster/FTE results.</li> </ul>
<b>12. Roster testing</b>	Workshop going through how to do roster testing using the software. There is	CNM/CMM Service manager/nursing leader Health unions Others as appropriate	1.5 hours	<ul style="list-style-type: none"> <li>• Review of ward/unit context assessment.</li> <li>• Review of the 'what if scenario' charts for each day and each shift.</li> </ul>

Workshop	Delivery mode	Recommended audience	Estimated time	Content
	also a power point presentation available.			<ul style="list-style-type: none"> <li>Adjustment of rostered hours to achieve the best match to patient demand.</li> <li>The working group (or equivalent) must agree the data inputs, preferably prior to roster testing. If the inputs are not agreed prior, roster testing may need to be repeated.</li> </ul>
<b>13. Multi ward report</b>	Workshop discussing the multi ward report from the software.	FTE working group	1.5 hours	<ul style="list-style-type: none"> <li>Review of the multi ward report.</li> <li>Identify anomalies and facilitate decision making.</li> <li>Completed only when multiple FTE calculations are undertaken. More than 5 wards will require more time.</li> </ul>
<b>14. FTE calculation checklist</b>	Workshop discussing the results of the FTE calculation checklist.	FTE working group	1 hour	<ul style="list-style-type: none"> <li>Review of the completed FTE calculation checklist.</li> <li>Identify anomalies and facilitate sign-off prior to submission to the CCDM council.</li> <li>Completed for one or more FTE calculations. More than 1 hour will be required to review multiple checklists.</li> </ul>
<b>15. Translating the FTE into practice</b>	Power point presentation.	FTE working group CNM/CMM	1 hour	<ul style="list-style-type: none"> <li>Review of software roster profile and final FTE tab</li> <li>Identify the roster model including planned leave</li> <li>Identify the FTE to employ</li> <li>Identify FTE to include in the budget and on what budget line</li> </ul>