Slide 1

Creating A Staff Development Program

Lynn Lawrence, CMSgt(ret), USAF
MSOL, CPOT, ABOC, COA, OSC
See The Light Consulting

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Slide 2

THE GROWTH AND DEVELOPMENT OF PEOPLE IS THE HIGHEST CALLING OF LEADERSHIP
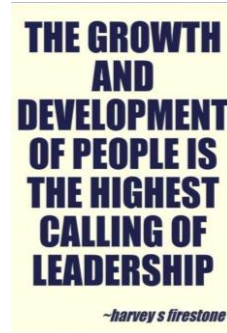
~harvey s firestone

Business Goals

- Company Growth and Development
- Specific Areas of growth
- Tracking and Monitoring
- Staff Awareness
- Staff Meeting and transparency
- Leadership and Management

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Slide 3

Culture For Advancement

- Leader's oversight
- Mentoring is a great idea
- Where is training taking place
- Are there opportunities within the office to expand learning

When 68% of your employees would prefer to learn at work, it's clear that developing your workforce's skills should be a top priority.

68%

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Slide 4

Objectives

1. Best practices for onboarding following hiring of career staff.
2. Learn how to develop a performance standard.
3. Learn work priorities and priorities
4. The attendee will learn where to find the resources to begin a path of certification.
5. The attendee will take away an understanding of the importance of a staff development, certified optometric staff, and creating a culture of staff career recognition.
6. Communication amongst staff to encourage higher learning

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Slide 5

STAFF DEVELOPMENT
Strategic Staff Training Programs

What is a Staff Development Plan

- Something more than a job, adds value, purpose, and a future
- A pathway for the individual's future and company growth
- Training and development opportunities
- Potential opportunities within and outside of the organization
- Goals must be timed

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Slide 6

Indeed UK

A staff development plan, also known as a work development plan, is a process for helping your team members improve their skills for their current position and acquire skills and knowledge for new duties and responsibilities in a company. It can prepare them for a leadership position or prepare a more senior professional for a position in other departments.

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What is a staff development plan?

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When employees respect each other and get along in the workplace, it's amazing how productivity increases, morale increases and employees are more courteous to customers.

QUOTEHD.COM   Maureen Wild

What's The Plan

- Business goals
- Direction for the business and the individual
- The Individual's personal goals
- How to connect the two

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Steps

- Goals
- Desired outcome
- Strategy
- Action
- Results
- Assessments
- Training versus Development

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Benefits of a work development plan

- Helps the company attract qualified career candidates
- Improves company engagement
- Improves worker performance
- Improve the company's operations and business performance
- Guide the company towards future goals

"When a flower doesn't bloom you fix the environment in which it grows, not the flower."

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DON'T DECIDE YOUR FUTURE.

DECIDE YOUR HABIT AND YOUR HABIT WILL DECIDE YOUR FUTURE.

ASHMOTIVATION

How to create a work development plan?

- Set goals
  - When creating a work development plan, consider the major milestones or goals the staff has in mind.
- Conduct a skills gap analysis
  - The professional's skill proficiency
  - The professional's frequency of skills usage
  - Level of professional's skills important to job performance
- Choose the right training option
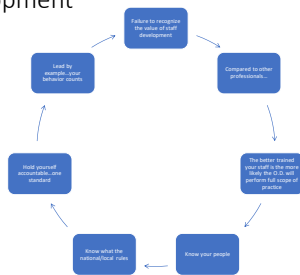 - When a team member's confidence increases, they are likely to perform better at work.

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Value Top-down for a Staff Development Plan

- Management directed

- Leadership implemented

- Trainee enhancing ...consider this in a probationary period

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Staff Development

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Types of plans

- Taylor your development on the organizations needs and goals, it focuses staff and provides direction

- Types of plans
  - Formal
  - Informal
  - No training plan

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Create a development plan…

📈	Have a training plan to monitor all staff growth and development
💟	Give adequate time for development and relay this up-front on interview day
🗓	It must be pre-determined what is necessary to be in the plan
◼	Planning should include all org levels

A great plan is a recipe for success

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Identify Key Tasks – what/why is it important?

- What is important?
- Why is it necessary?
- What is nice to have
- Is cross training an option?
- What are our showstoppers?

ANTI-STRESS KIT

BANG HEAD HERE

Directions:
1. Place on FIRM surface.
2. Follow directions provided in the circle.
3. Repeat until you are Anti-Stressed, or become unconscious.

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Understanding the different learning styles

- Everyone learns differently
- Assess the employees
- Do your best to meet them at their learning levels
- The better the training, the better the outcome
- Get feedback throughout the training

Types of Vision Therapy - Bing images

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The Start

- Do not fail here…could be catalyst to success/disaster
- Be specific…pay, training, vacation
- Give a probationary period…120 days
- Have a signed agreement
- Talk about what you expect…know what is important to your practice…dress, appearance, language, time off
- Ask what they expect
- Ask about personal goals…listen carefully

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LEADERSHIP IS ABOUT MAKING OTHERS BETTER AS A RESULT OF OUR PRESENCE AND MAKING SURE THAT IMPACT LASTS IN OUR ABSENCE.

Must Gain Staff Buy-In

- What do workers value?
- Communicate with the staff, you must them
- Hiring process
- Create clear steps/pathway
- Professional
- Career Development
- Strategic planning

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Why You Need A Staff Development Plan

- Types of training
- Orientation
- Induction
- Just In Time
- Inservice
- Continuing Education
- Special Function

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What happens when you fail to train them?

- Chaos
- No consistency
- Threat to the practice (HIPAA, OSHA, Fraud, etc.)
- Threat to patient care
- Hinderance to team building
- Increase in turnover
- Training for your competition

REGULATION AND COMPLIANCE
ESCAPE YOU CAN NOT

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Staff Development – What is Success?

- Assess the education needs of the staff
- Set priorities
- Develop objectives for the development program
- Determine the resources needed for each objective

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Developing Performance Standards

- Performance standards are really just the end result of a multi-step process. Prior to development of performance standards, ensure that the job duties are clearly stated.
- Once the actual duties are outlined, you can begin to develop criteria that allow you to accurately measure whether the work is done to the required standard.
- Performance criteria can generally be broken down into the distinct types of qualitative, quantitative, or a combination of the two

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Three Levels of Performance Standards

- *Qualitative*
- Qualitative criteria are just that—criteria that defines the quality of an item. TEST How well is it done or how **accurately** was it done?
- *Quantitative*
- Quantitative criteria define themselves—criteria that measure **the quantity or amount** of something done. It measures how much, how fast, or how often something is done.
- *Combined*
- A combined task is a task where you are concerned not only about the accuracy of a task but also how quickly that task can be done.

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Learning

Do	What do you want them to learn
Do	How do you want them to learn it
Assess	Assess the learning style of the employee
Monitor	Monitor the learning process

Analytical Thinking Skills + Knowledge + Effective Communication

Successful System Design Interview

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Choose The Right Training Option

Specialized project: Developing a specialized project different from the typical day-to-day responsibilities can help a team member learn new skills, develop their existing skills or work with new teams.

Individual coaching: Coaching involves a senior staff member working closely with young or inexperienced professionals. Coaching might involve teaching by word of mouth, actual demonstration of work and walking with professionals by answering their questions.

Mentorship: Working with an industry expert can help a professional learn more about their specialty. Mentorship can be a great programmed for any team member who wants to explore careers in other departments, as they can shadow the expert and ask questions.

Networking: Networking can help professionals discuss their professional development with co-workers who have similar goals. You can organize a networking opportunity with staff or managers with similar development plans to find out what others do.

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Example: Video on Stereo Testing

- A trainee can first go online and watch a video and take a test to ensure that were able to grasp the concepts of the training topic.

- Have the trainee explain and demonstrate what they learned from the video
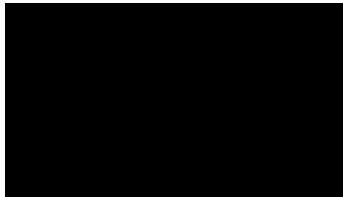
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Vendor Training

- Incorporate your vendors into the training program, it is a win-win for the office and the vendor, and the product/service being used

- Schedule this training and allow adequate time for the training
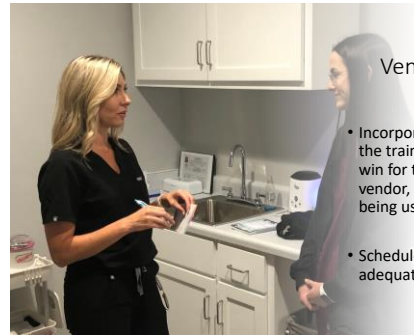
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Work development plan cont...

- Set performance metrics and appraisals
  - Once you have chosen the right training option, consider using a work development plan template to make your job easier
- Use a development plan template
  - **Individual work development plan:** This can help a team member reflect on their personal career goals and how they can align their skills or abilities to the company's goals.
  - **Succession planning template:** This template can help you look towards the future to determine where the company needs to expand or hire. It can also articulate what resources are already present and if they require further development.
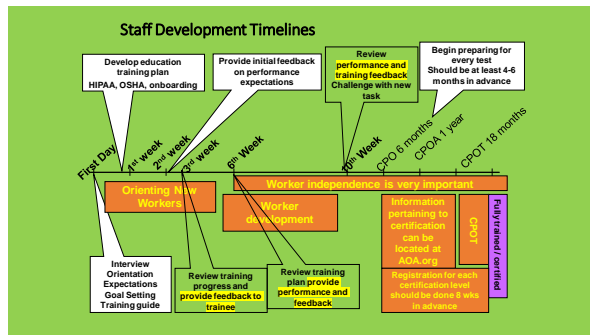
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Sample Development Tool

- Reflective targets that the trainee and trainer can use to monitor growth

- Performance tool

- Leadership and management tool

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Staff Development Timelines

Develop education training plan HIPAA, OSHA, onboarding
Provide initial feedback on performance expectations
Review performance and training feedback Challenge with new task
Begin preparing for every test Should be at least 4-6 months in advance

First Day · 1st week · 2nd week · 3rd week · 6th Week · 40th Week · CPO 6 months · CPOA 1 year · CPOT 18 months

Orienting New Workers
Worker independence is very important
Worker development
Information pertaining to certification can be located at AOA.org
Registration for each certification level should be done 8 wks in advance
Fully trained / certified
CPOT

Interview Orientation Expectations Goal Setting Training guide
Review training progress and provide feedback to trainee
Review training plan provide performance and feedback

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Work Priorities- adequate resourcing required

- Time Management Tools
- List making
  - Patient care must be first priority!
  - Daily List
  - Weekly List
  - Monthly List
- Assign priorities
  - What needs to be done first
  - How much time does the task take
  - Must remain flexible
  - Caution with interruptions

Job Duty	Performance Criteria/Standard	Appraisal statement
Order contact lenses for optometry/ ophthalmology.	All contact lens orders received in supply within 2 days of final contact lens fitting.	Decreased order time by one day. Ensured order placed in supply within 24 hours of receipt.

Early Technician	Late Technician
Arrives at work at 0730.	Arrives at work at 0830.
Opens the doors 15 mins before 1st patient	Immediately begins patient care.
Prepares the clinic for receiving patients.	Lunch at 1130 or 1200.
Obtains records if needed.	After clinic closes for day prepare record requests, straightens work areas, ensures spectacles orders are sent, etc.
Other administrative duties as needed.	
Lunch at 1030 or 1100.	Released for the day at 1630.
Released for the day at 1500.	

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Personal Goals

- OJT
  - Front Desk
  - Technicians
  - Opticians
  - Billing Dept
  - Leadership and Management
- Skills gap analysis (what to do/how often)
  - Proficiency level
  - Frequency of usage
  - Level of skills importance
- Cross-training
- Certification testing
- Skill utilization (performance matrix)
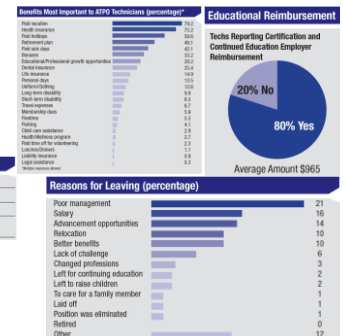- Opportunities for leadership

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What Is Important?

Average Compensation of Certified Personnel	Hourly	Annual Salary
Certified Ophthalmic Assistant (COA)	$22.90	$59,773
Certified Ophthalmic Technician (COT)	$25.90	$66,008
Certified Ophthalmic Medical Technologist (COMT)	$29.50	$79,964

Educational Reimbursement
Techs Reporting Certification and Continued Education Employer Reimbursement
20% No · 80% Yes
Average Amount $965

Reasons for Leaving (percentage)

The Ophthalmic Staffing Shortage (reviewofophthalmology.com)

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Plan Execution

- Track results and use data to make an informed decision
- Provide regular feedback
- Eliminate barriers
- Encourage self-development
- Constant monitoring/reporting

- **Today's date:** September 25, 2021*
- **Name of staff member:** Eye C. A'lot*
- **Current job title:** Level 1 Technician*
- *Goals:*
  - Onboarding training within 5 days of hire
  - Compliance training (HIPAA, OSHA, Medical Fraud)
  - Complete 90-day probationary period
  - Learn prescreening techniques
  - Perform diagnostic testing
  - Contact lens basics and patient insertion/removal education
  - First level of certification (CPO)
- *Training needed:*
  - Workbook, video reviews, on-the-job training/evaluations
  - Patient pre-screening techniques
  - Charting and documentation
  - Video reviews/ online Dr. Tim Root
  - On-the-job training with authorized trainer
  - Complete workbook and in-house testing
  - Completed training records / signed off by trainer
- *Estimated costs:*
  - On-the-job training $3,500
  - On-line training, $300 for certification review
  - $300 certification testing
  - Attending conference $2,000 (progress-based opportunity, determined by leadership)
- *Completion date:* 1 year from hire date
- Next phase: Assign trainer for Scribe Training

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Young Workers Want A Future

Millennials are no longer content to just have a job, work should be meaningful and add value.[2] While being financially stable is a part of this, having the time to balance work and family commitments as well as having benefits that are values-based, will engender loyalty to your company. Deloitte produced a Global Human Capital Trends survey in 2018, which surveyed more than 11,000 business leaders, HR leaders, and executives worldwide. "Among this group, social capital plays an outsized role in where they work and what they buy, and 86% of millennials think that business success should be measured in terms of more than just financial performance."[3]
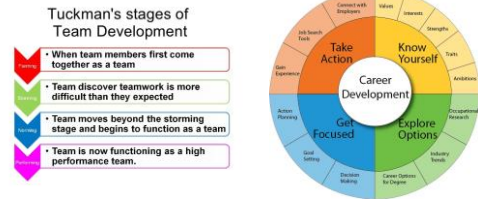
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Competency Matrix

- Technical ability
- Execution, initiative, and accountability
- Interpersonal skills and communication
- Strategic alignment
- Tailored for the position

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Team Staged Development = Expectations

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General Training

Documentation protects everyone

- HIPAA
- OSHA
- Employee Requirements
- Office Policies
- Dress and Appearance*
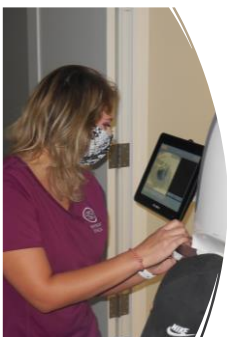- Chain of Command*
- Probationary period*

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Technically Specific

Position Descriptions for each:
- Front Desk
  - Check in
  - Checkout
- Technician
  - Scribing
- Optical
  - Optical Lab
- Billing

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Ophthalmic Staff Development

- Position
- Level
- Pay
- Training requirements
- Trainer requirements
- Timelines
- Certifications
- Pathway for progression to the next level

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Benefits of a Staff Development Plan

- Help the company attract qualified candidates
- **Improve engagement:** A work development plan can help managers engage with team members, which can strengthen their relationships.
- **Improve performance:** Goals usually involve practicing new roles or learning new skills. These new skills can help team members improve their performance in their current jobs.

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Cont…

- **Improve the company's operations and business performance:** If an individual consistently learns and grows, they can boost their efficiency and help the company generate more profit.
- **Guide the company towards future goals:** A strong team development plan can help an organization and its staff achieve its future goals, whether you're developing the skills necessary to perform well or training team members for future leadership roles.

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When to let them go!

- Placeholders … hurt the practice
- ROI …
- More drama than money
- Wants more money than work
- No concept of teamwork
- Does not understand customer service
- Is truly an alien – NOTW – culture killer

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Impact/Value of Staff Development

- How does a certified staff impact a practice
  - Office efficiency
  - Team based medicine
  - Overall patient care
  - Patient satisfaction
  - Revenue/Finances
  - Strategic planning
- How does being certified impact the individual
  - Professional development
  - Personal motivation

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## Results of effective Staff Development

- Builds rapport and sets boundaries
- Provides direction and establishes expectations
- Connects management staff, and patients
- Ties the goals and vision of the practice to staff development
- You get an excited staff family

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Surveying Your Staff

- It is important to get input from your staff
- It is important to listen to your staff
- Staff must be led, their input is valuable, but decision are made at the top
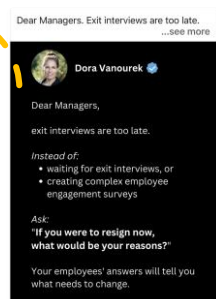
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Options for Education

- In-Office Training
- Vendors
- State and local meetings
- National meetings

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Identifying resources

- Trainers ...should be someone who can be focused/
- consistent

- Necessary equipment

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Credits

- Ophthalmic Professional - Create a personal development plan
  - Erica Harris
- Grow | Employee Development Software | Lattice

- How To Write a Staff Development Plan (With Example) | Indeed.com Hong Kong

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