

Equality Training Strategy Report

Stockport NHS Foundation Trust

June 2010



Contents

Introduction and Executive Summary	1
Section 1: The business case for this strategy	3
Section 2: Current equality training at the Trust: challenges and opportunities	5
Challenges:	5
Opportunities:	6
Section 3: Our recommendations	10
Overview and headlines	10
Agreeing priority training needs	10
Learning and Development Interventions	14
Appendix: How we developed this strategy	21

Introduction and Executive Summary

This strategy has been developed in conjunction with Equality Works, who have reviewed relevant documents and statistics, spoken to key staff and made recommendations based on their experience. This exercise has been externally funded by the Commission for the New Economy. See appendix for details of Equality Works and the approach they have taken to this project.

Why do we need an Equality Training Strategy?

- To meet the commitments of our own Single Equality Scheme
- To meet our responsibilities within the Equality Act 2010
- To link into the Patient & Family Experience Strategy
- To prevent and improve in the light of patient complaints
- To improve our scores in the NHS staff and patient survey
- To respond to consultation with patients' groups
- To assure our commissioners that we take equality seriously
- To demonstrate our compliance with the Care Quality Commission standards

What Equality & Diversity training is happening at present?

- Just 7% of trust staff received the 5.5 hour Diversity Awareness course between Dec 07 and March 10 – the majority of these were from Facilities
- Approximately 18% of trust employees completed the NW Equality and Diversity online package between Oct 08 and Jan 10
- It is likely that at least 3/4s of all staff have not received any input on this topic in the past 18 months
- There has been no systematic evaluation of the impact of either of these interventions on those who have received them

Next steps

A matrix which proposes core equalities competencies for different staff groups has been developed, based on how their role relates to other staff and to patients. The learning outcomes of future training interventions should link into this matrix and this should also be incorporated into the appraisal systems and Personal Development Plans to ensure training is targeted at those who need it most.

Further recommendations include:

- Develop equality input for Induction and Mandatory Refresh

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- Incorporate equality into the general training programme
 - Incorporate equality into the Senior Management Academy
 - Develop a *Managing Diversity* Course
 - Develop and deliver a programme of bite-sized ward-based training sessions
 - Consider options for selecting and supporting champions across the trust
 - Engage and train leaders (Board/ Executive Team), clinicians and members of the Employment Service Group

Equality Works has been commissioned to provide 3.5 days of consultancy support to us as we implement this strategy, ideally between July and September 2010. This document sets out a number of ways in which this support might be provided.

Section 1: The business case for this strategy

Developing an Equality & Diversity training strategy is a key commitment within the trust's Single Equality Scheme 2009-12.

There are a number of key drivers for the trust to make sure that its employees have received the learning and development they need around equality and diversity. These include:

- The Equality Act 2010 introduces new legal responsibilities for the trust and its employees, for example by extending protection from age discrimination to those accessing services and by extending the trust's public duties to promote equality across areas such as sexual orientation, religion/belief, age and socio-economic exclusion. The Equality and Human Rights Commission is tasked with checking that trusts and other public bodies are meeting these legal duties and do carry out spot-checks for evidence of this.
- Providing effective learning and development on equality and diversity can help the trust demonstrate its compliance with the Care Quality Commission core standards. Failure to comply with equality legislation is likely to result in a non-compliance order/ enforcement order from the Care Quality Commission
- Equality and Diversity is one of the seven core concepts/ primary drivers in the trust's Patient & Family Experience Strategy.
- Improving staff practice in promoting equality and diversity should help us to respond to and reduce patient complaints regarding discrimination (of which there were 11 last year); nursing care, including privacy and dignity (which had doubled since the previous year); and communication (especially in elective services, which was the largest cause of complaints last year).
- The 2009 NHS staff survey suggests areas of concern to be tackled by equality training, such as the increase in the proportion of staff reporting harassment, bullying or abuse by other staff. It also highlights opportunities to promote learning and development, such as the increase in staff receiving appraisals and personal development plans, which have informed this strategy.
- The 2009 patient surveys provide evidence of much good practice within the Trust, however areas for improvement include: better information on discharge, better communication from doctors and other professionals in outpatient settings, and more information about how to complain. Although trust performance on being treated with dignity and respect and on religious beliefs is slightly above average, there is still room for improvement. All of these areas could be improved by training for clinicians and other frontline staff which helps them to understand the barriers diverse patients can encounter and develops their skills and confidence in communicating with them.

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- Staff training needs have been identified through consultation with equality groups in the community, including learning disabled, visually impaired and physically disabled patients. This strategy responds to these concerns.
 - In order to perform well within the World Class Commissioning Framework and comply with the Single Equality Act, PCTs are increasingly being required to demonstrate that they are building equality and diversity into their commissioning processes. This is likely to include asking providers for evidence about the steps they have taken to support and train their employees in this area.

A *strategic* approach to equality training promotes cost effectiveness by ensuring that:

- Training is targeted at (and taken up by) those roles which need it most
- Learning from training is embedded in practice
- Take-up and outcomes from training can be evidenced
- Training interventions can be continually improved

Section 2: Current equality training at the Trust: challenges and opportunities

Challenges:

Take-up of face-to-face and online training

Between December 2007 and March 2010, 19 x (5.5 hour) Diversity Awareness courses have been held in-house, attended by 295 staff in total, from a wide range of roles. 8 of these courses (held during Feb/March 2010) targeted facilities staff only, of which 184 attended). Overall, approximately **7% of all trust employees** have received this intervention over the 27 months to March 2010.

In the 16 months between Oct 2008 and Jan 2010, 791 employees completed the VLE Equality and Diversity online package (developed in the NW region) to tier 1 (general awareness level) and 681 to tier 2 (strand by strand). Since learners are strongly advised to complete tier 1 before progressing to tier 2, it is likely that there is significant overlap between these two groups. Assuming all those completing tier 2 had also completed tier 1 during this period (and discount the impact of staff turnover), approximately **18% of trust employees** have received this intervention during this 17 month period.

Based on this information, it seems safe to assume that at least three quarters of the trust's employees did **not** receive any specific equality and diversity learning and development between October 2008 and January 2010. The proportion of staff reporting that they had received equality and diversity training in the preceding 12 months in the 2009 NHS Staff Survey (i.e. 47%) was therefore not borne out by the review of take-up statistics.

Embedding the learning throughout the trust

Several things need to happen to maximise the embedding of learning throughout the trust:

- Improve coverage so that more employees are getting key messages about equality and diversity more frequently
- Ensure that learning and development in this area can be readily and demonstrably applied through behaviours, practices and the development of skills
- Develop the role of managers and the use of the appraisal/ PDP system to assess and reinforce these behaviours, practices and skills
- Evaluate the impact of learning and development and use the findings of this to adapt existing and plan new interventions

Evaluating the impact of learning and development

Reaction sheets are completed by participants at the end of the Diversity Awareness training course and that these are reviewed by the trainers but a more systematic evaluation, including collation of these responses and/or follow-up evaluation has not been attempted to date. There is no apparent evaluation undertaken to consider the impact of the online training package on those completing it.

Budget constraints and threats

Cost-cutting is a key driver for the Trust at present and therefore the recommendations suggested are most likely to represent value for money. Whilst dedicated, face-to-face training, delivered in small groups, can be the most effective way of promoting development around equality and diversity, it is recognised that training large numbers of staff in this way would be prohibitively expensive in the current economic climate. Therefore this strategy identifies other, most cost effective opportunities for reaching as many staff as possible, and ways in which a limited number of dedicated, face-to-face training sessions might best be targeted.

Opportunities:

In this section, the report considers existing learning and development activity around equality and diversity and on opportunities for future activity.

Senior Management Academy

Following consultation with senior managers and the executive team, this new programme of training has recently been introduced for 2010-11. Senior Managers are asked to work through a Training Needs Analysis with their line managers in order to identify and prioritise their personal training requests from a menu of 20 sessions (10 x 0.5 days; 9 x 1 days; and 1 x 2 days) running between April 2010 and March 2011.

Annual training programme

There is currently a 30-45 minute session on Dignity and Respect/ Meeting Patient Needs within both the **induction** programme for new starters and the **mandatory refresh**, which trust employees are required to attend every two years. This session touches very briefly on equality and diversity. The content of these sessions is currently being reviewed to align with the trust's values. There are, however, challenges around attendance at the mandatory refresh which mean that it cannot be automatically assumed that all staff will be reached by developing the equality input in this session.

The Trust already runs several training sessions which cover equality-related topics within its annual programme. In addition to the Equality Impact Assessment Training and the Diversity Awareness sessions (see below), there are four specialist, stand-alone sessions which focus on the **needs of older people**, including one on Challenging Ageism and Age Discrimination (which may need to be updated in response to the Equality Act 2010).

The **Foundation Degree in Health & Social Care for Trainee Assistant Practitioners** contains a number of optional specialist modules such as 'Disability and Society' and 'Cultural Diversity within the Community'. Similarly the **Risk Management** programme includes sessions on the Mental Capacity Act, the mental health of older people, and 'Poverty, parenting and social exclusion'.

There are also a number of **HR-run skills training sessions** covering disciplinary, sickness absence, bullying & harassment, and performance monitoring. These make reference to equality law and issues but are focused more on procedures than developing skills and exploring scenarios.

The 1-week **Healthcare Assistant Training Programme** does not make explicit reference to equality and diversity though there is a discussion and quick overview of methods of communicating, barriers and how to overcome them. This is contained within the 4-hour section on Introduction to Programme and Confidentiality.

There are a range of other courses within the annual programme which offer an opportunity to introduce equality and diversity, either due to the topic (e.g. Appraisal Skills) or due to the target audience (e.g. Leadership Programme or Admin and Secretarial Development Programme). This is discussed further within the recommendations section.

Diversity Awareness Programme

The current programme focuses on attitudinal and behavioural awareness and also includes materials on patterns of inequality in the NHS workforce and the business benefits for promoting equality. Although it is not intended to provide detailed coverage of the equalities legislation, the trainers who deliver it are aware that the legal content needs updating in the light of the Equality Acts 2007 and 2010. At present, the course does not contain activities (e.g. scenario-based work) to develop skills such as challenging discrimination, or managing diverse teams.

Although all employees should benefit from receiving specific equality and diversity training, there are opportunities to focus future stand-alone diversity training at the groups of employees who are in a position to apply their learning to greatest effect. In 2007-2010, just 8% (24) of those who have attended the course appear from their job titles to be in management or supervisory roles (e.g. sister/ charge nurse, admin manager, supervisor, etc). 22% (65) of delegates appear from their job titles

to be in frontline patient-care roles (e.g. healthcare assistants/ support workers, staff nurses, allied health professionals, etc).

Take-up across divisions varies dramatically. The concerted drive to train Facilities and Estates staff shows what is possible when there is senior management commitment to promoting attendance: 40% and 37% respectively have received the diversity awareness programme. However, a very small minority of staff from key frontline divisions have attended this voluntary programme: just 1.6% of Elective Services and 2% of the Medicine and the Women's and Children's Division.

Online packages (NW and national)

The VLE Equality & Diversity package has been developed within the North West region of the NHS. The tier one materials provide a good basic introduction to equality and diversity, including, for example, information about the business benefits, the trust's legal responsibilities, legal case studies, information about using power responsibly, statistics about diversity within the NHS workforce. The objectives are ambitious for a 20-30 minute online learning application, however, these materials can provide a cost effective supplement to induction and/or mandatory refresher input and other interventions.

Although tier two of the package contains some good materials, an assessment highlighted a number of limitations, including:

- Legislation needs updating from 2007 (as well as to include the recent Single Equality Act) and since the materials are very legally focused, the current version has significant limitations
- The materials do not consider institutional discrimination and would benefit from more examples of how discrimination gets built into the way in which organisations operate – culture, policies, procedures, use of discretion, resulting in some of the patterns which are included
- There is a lot of legal and definitional information to digest, not all of which will be required for most roles and could be off-putting and the assessment questions do not always seem to test the learning as well as they might
- If busy professionals are going to spend around 2 hours on an online learning platform, it may be better to dedicate more of this time to considering practical examples, scenarios and behaviours, involving colleagues, patients and families.

National online learning programme

The trust also has free access to the national NHS Core Learning Unit on Diversity Awareness, developed by Grass Roots, but is not currently offering this to its staff. A very brief review of this resource by Equality Works did not suggest that this resource is superior to the North West's package.

Dignity and Respect Champions

Four or five years ago, each ward and/or staff team appointed a Dignity & Respect champion. A total of 150 champions have received seven 15-minute training sessions, each focusing on one of the Dignity & Respect standards (e.g. answering the telephone; meeting and greeting; appearance). The champions were then asked to cascade these topics to their colleagues, during team meetings or on the ward. Staff have been encouraged to sign up to each standard on posters displayed on staff notice boards to reinforce the learning and commitment. The Learning & Development team reported that this model has worked well and they are keen to maintain the project's momentum, possibly including equality and diversity topics in a second round of activity. However, the Heads of Nursing have warned that there has been little consistent activity since 2006 and that some champions have moved on since then. This model – and perhaps some of the remaining champions – may provide opportunities to promote or even, with careful assessment and structured support, deliver parts of this strategy.

Section 3: Recommendations

Overview and headlines

Equality Works propose a model which sets out core equality competencies for employees throughout the trust and recommend that, once approved; this is incorporated into individual appraisal systems/ personal development plans and organisational audits.

They recommend eight cost effective measures as to how these training needs can be met:

- Equality & Diversity at Induction and Mandatory Refresh
- Incorporating equality into general training programme
- Incorporating equality into Senior Management Academy
- Developing and delivering a Managing Diversity course
- Developing and delivering a programme of bite-sized ward/ team-based training
- Identifying and supporting ward-based champions to support the strategy
- Engaging and training leaders, clinicians and equality representatives
- Evaluating the strategy

Agreeing priority training needs

If it is to target training interventions effectively, the trust needs to agree what type and level of equality training people at different roles require. This will provide a standard to inform both individuals' personal development plans and organisational audits of training across divisions, grades or other staff groupings. A review of training needs linked to these competencies should then be built into the appraisal system (and reinforced through the Appraisal Skills programme).

To keep this as simple as possible in a large and complex organisation, the strategy includes a matrix which divides the workforce into three horizontal groupings (their role in relation to other employees) and three vertical groupings (their role in relation to service users).

Employment groupings

Senior Managers	Heads of Nursing, (Assistant) Directors	(Assistant) Directors	Business managers, (Assistant) Directors
Managers	Nurse managers, Sisters, Ward managers, Allied professional team leaders	Supervisors in estates/ facilities, those managing customer-facing records/admin staff	Those managing inward-facing roles, e.g. admin managers, senior pharmacists/ lab technicians, etc
Staff	Nurses, HCAs, Asst Practitioners, Allied professionals	Appointments, reception and some medical records and pharmacy staff, most facilities/estates staff (porters, cleaners, catering, security, car parks, gardeners)	Staff in IT, Finance, HR, L&D, Oc Health, Lab & most pharmacy staff, Inward-facing admin roles
	Patient care	Customer interface	Internal

Service provision groupings

Below is a set of core equality competencies for each of the six groups. Each job role would identify the two most relevant sets (i.e. one from the Employment groupings and one from the Service provision groupings as per the matrix above. Next to each skill set the corresponding recommended learning & development intervention is outlined.

Employment groupings

● Core equality competencies	● Training interventions
Staff	
<ul style="list-style-type: none"> ● Understand what equality, diversity and discrimination mean and why they matter within the trust ● Have a basic understanding of employees' rights and responsibilities under the equality legislation ● Understand how they can promote an inclusive and respectful culture in diverse teams 	<p>Induction + Tier 1 of online learning</p> <hr/> <p>Mandatory refresh</p>

<ul style="list-style-type: none"> Recognise and respond appropriately to behaviours that discriminate or undermine equality and diversity. 	
Managers	
<p>The above, plus:</p> <ul style="list-style-type: none"> Understand managers' responsibilities within equality legislation and trust policies/ procedures relating to equality; Identify and take action when behaviours discriminate and/or undermine equality and diversity (including bullying & harassment); Understand good practice in managing diverse teams, including performance management and staff development; Understand institutional discrimination and how this can occur in processes such as recruitment and selection 	<p>Stand-alone equality and diversity training for managers</p> <p>Equality mainstreamed into general training programme, e.g. HR Skills, Interviewing & Appraisal Skills, Introduction to Management, etc</p>
Senior Managers	
<ul style="list-style-type: none"> Identify any patterns of discrimination in employment and service delivery and monitor the effectiveness of equality-related policies; Ensure business plans and procurement promote equality and diversity and focus resources to deliver equitable outcomes; Demonstrate professional leadership around equality and diversity and promote a positive and inclusive culture amongst staff for whom responsible; and Ensure that equality-related training and support needs are identified and met wherever possible. 	<p>Senior Management Academy – stand-alone and/or built into other modules, e.g. business planning, procurement, etc</p> <p>Board/ exec team training input</p>

Service provision groupings

<ul style="list-style-type: none"> Core equality competencies 	<ul style="list-style-type: none"> Training interventions
Internal	
<ul style="list-style-type: none"> Understand and demonstrate behaviours that promote equality, dignity and respect in any dealings with visitors and members of public (including patients) as well as colleagues; 	Induction and mandatory refresh
Customer interface	
<p>The above, plus:</p> <ul style="list-style-type: none"> Have skills and confidence to communicate positively with diverse members of the public; Understand how to make basic reasonable adjustments appropriate to job role (e.g. to operate induction loops, produce accessible documents, give information to learning disabled patients, etc) 	Equality considerations built into general training, e.g. Telephone Skills, Admin and Secretarial Development Programme, Customer Care, etc
Patient care	
<p>The above, plus:</p> <ul style="list-style-type: none"> Understand how patients' social identity and their expressed beliefs, preferences and choices might affect their care (e.g. end of life care, diet, consent, personal care of trans patients, etc); Be able to communicate appropriately with diverse partners, families, and carers, especially around discharge from hospital; Understand the importance of challenging or reporting discrimination between patients, staff or other members of the public 	<p>'Bite-sized' ward/team-based training</p> <p>Mandatory refresh</p>

Learning and Development Interventions

Equality and diversity at Induction and Mandatory Refresh

Time is understandably limited within these programmes but both provide a valuable opportunity to convey key messages about equality and diversity, which could be supplemented by a requirement to complete tier 1 of the online training programme.

The following key points could (if necessary) be covered in a 10-15 minute presentation:

- What equality and diversity mean and why they matter to the Trust;
- Responsibilities of all staff in promoting equality and diversity; and
- Key documents, resources (e.g. E&D intranet), learning and development, etc on equality and diversity

The Trust would need to take steps to promote attendance at mandatory refresh is this is to have an impact across the organisation.

Once the Trust is confident that these basic messages have been given to existing staff, subsequent mandatory refresh sessions could focus, perhaps using short scenario-based activities, on:

- Behaviours which promote equality and diversity and a positive inclusive culture
- Responding appropriately to discrimination

Incorporating equality into general training programme

In addition to the specific courses related to equality (Diversity Awareness and Equality Impact Assessment training), there are a large number of courses within the current annual training programme which should include a consideration of equality and diversity. Mainstreaming equality and diversity in this way can be a cost effective way of embedding learning into the organisation, both through reaching large numbers of employees and also by linking equality and diversity learning to other practical skills.

In practice, equality and diversity might be 'woven in' to existing programmes by, for example:

- Including/ developing a case study/ scenario for discussion which shows one or more social identity (e.g. race, gender, disability, etc) in one or more of the characters;
- Including a slide/ handout page setting out how equality and diversity relate to this topic; or
- Trainer prompts and questions to explore whether and how patient or employee diversity might affect a situation.

The following table, lists the courses into which equality and diversity might usefully be woven in this way and summarise the key linkages/ topics in the column on the right. NB courses are listed in the order in which they appear in the annual programme.

Course title	Equality dimension
Introducing Management	Managing diverse teams, supporting individuals' needs and changing circumstances, professional leadership around equalities
HR Skills for Managers – including Performance Monitoring, Disciplinary, Sickness Absence, Harassment/ Bullying with a mandatory 2 year skills update/ refresher	Exploring different patterns for equality groups in all these areas, managing diverse teams, supporting individuals' diverse and changing circumstances, professional leadership and challenging discrimination
Three Day Leadership Programme	Professional leadership on equalities, Service improvement and equality, Building equality into business planning and performance management
Appraisal Skills	Exploring different outcomes and patterns for equality groups; performance assessment and learning development of diverse team members; building equality objectives into the appraisal; understanding and assessing training needs on equality
Interviewing Skills	Developing non-discriminatory questions and tests, reasonable adjustments, assessing skills and experience of younger/ older candidates and those who have had career breaks
Five Day Administrator/ Secretarial Development Programme	Communicating with diverse customers and staff – telephone, face-to-face and through written materials; organising accessible and inclusive events and meetings; challenging discrimination
Train the Trainer	Developing inclusive training materials; challenging discrimination in the training room
Telephone Skills	Using textphone/ language line, avoiding assumptions (age, sexuality, gender), names (family name conventions, unfamiliar names, etc)
Safeguarding Vulnerable Adults	Overlap with equalities (around disability and maybe age); positive communication/ promoting rights of these groups; impact of other social identities here (e.g. ethnicity, gender, etc); when is abuse also

	discrimination/ harassment?
Basic Guide to the Management and Investigation of Incidents	Identifying and responding to discrimination and harassment, considering potential impact of social identities on access, experience and outcomes of patients, staff and families
Conflict Resolution	Challenging discrimination; managing conflicts in diverse teams; preventing conflicts through positive communication, professional leadership, learning & development
Top Tips for Managing Change	Managing diverse staff teams fairly through uncertainty, restructure and redundancy; opportunities to promote equality and remove barriers through service improvement programmes
Developing Assertiveness	Identifying and challenging discrimination; bullying & harassment
Dealing with Difficult Relationships	Bullying, harassment and discrimination; tensions and misunderstandings that might arise from diversity in teams
Understanding of consent	Communicating with people and promoting the rights of people who have mental health problems and/or learning difficulties and their families/ carers
End of Life Care	Diverse cultural and religious beliefs about end of life/ bereavement

Incorporating equality into Senior Management Academy

This strategy recommends that the trust:

- Includes an equality and diversity module in the programme to cover topics linked to the core equality competencies (above) and/or:
- Integrates consideration of equality dimensions within the existing programmes (as for the general training above), focusing on the following modules:

Course title	Equality dimension
Recruitment Skills	Developing non-discriminatory criteria and interview questions; Monitoring patterns and setting targets within recruitment; Attracting diverse applicants; Selection and performance management of recruitment panels with respect to diversity and fairness.

Complaint Management	Ensuring the complaints process is accessible and fair; Identifying and responding to complaints which may involve discrimination; Monitoring, performance management and service improvement in response to complaints involving discrimination;
Business Planning Process	Incorporating equality objectives and actions into the business planning process; setting targets and monitoring equality objectives
Managing Challenging People and Situations	Managing diverse teams; challenging discrimination; identifying, preventing and responding to bullying and harassment
Procurement	Equality Act 2010 and procurement responsibilities; Understanding and implementing equality-related procurement requirements;
Workforce planning	Taking social identities (age, caring responsibilities, maternity, disability, migrant workers, etc) into account within workforce planning
Business Case Development	Considering the equalities impact of complex service change (Equality Impact Assessment); Developing a business case for promoting equality
FT contracts coding and PCT commissioning	Understanding equality requirements, equality monitoring and target-setting within commissioning
Coaching skills	Coaching diverse individuals – how social identity may impact on process and context; Opportunities to build equality considerations into coaching

Developing a Managing Diversity course

We recommend that the opportunity for specialist stand-alone equality training be focused on managers and supervisors. In line with the core competencies for this group, this programme should cover:

- Preventing, identifying and responding to bullying and harassment
- Challenging discrimination (both staff and service users)
- Managing diverse teams
- Staff development around equality and diversity – e.g. giving critical feedback, using appraisals and PDPs
- Understanding the trust's and its managers' responsibilities under the legislation
- Institutional discrimination: identifying and explaining patterns in workforce and service provision

Developing and delivering a programme of bite-sized ward/ team based training

Consultation with the Heads of Nursing showed support for the model of bite-sized (e.g. 15-30 minute) training sessions, either on the ward or during team meetings. The group's suggested topics for the programme echoed the many of the points raised within the Single Equality Scheme consultation. The initial priorities are:

- Using technology (e.g. text phones, loop systems, etc) and interpreters appropriately;
- Supporting learning disabled patients
- What is a 'reasonable adjustment' and how do we make them?
- Gaining consent: key points from the Mental Capacity Act
- End of life care – different cultural and religious beliefs and practices
- Working with transgender patients
- Why do we collect monitoring information from patients and staff?
- Chaperone policy and requests for same sex nursing care
- Working with sexual orientation
- Involving carers and support workers appropriately

A sample format for the sessions might be:

- What does the Trust policy say (if there is one)?
- Why is this important?
- Do's and don'ts for frontline staff
- Very short scenario for discussion and/or patient/ service user experiences (real or quoted)

It is recommended that the trust draws on a range of resources to deliver these sessions, including:

- Input from external VCS organisations such as Disability Stockport, especially for experiential input (could be by recording/ written quotes instead of attendance in person)
- Drawing on in-house expertise – e.g. the Specialist Bereavement Midwife, the Learning Disability Liaison Nurse
- Buying in specialist external input to deliver some of the more sensitive or complex sessions – e.g. around sexual orientation, transgender, and monitoring
- Training up and supporting a small group of carefully selected champions to deliver some of the more practical and less sensitive sessions, e.g. how to use a loop system or book an interpreter, implementing the chaperone policy, etc. (see following section)

Considering the scope for using ward-based champions to promote and embed

Refreshing and/or re-launching the Dignity and Respect Champions model could help to promote and embed the strategy in a number of ways. New champions may need to be identified and it would be strongly advised that a detailed audit of existing champions and/or new recruits to establish appropriate roles and required levels of support at the outset.

One approach might be to use the responses to carefully select a small group of champions on the basis of attitude, motivation, skills/experience and job role/ location. This group could then be trained and supported to undertake a number of possible roles, e.g.:

- Promoting the equality training strategy, especially the bite-sized sessions
- Following up on these sessions by signposting people to further resources, encouraging practical changes as a result of them
- Gathering feedback on the impact of these sessions and suggestions for future topics
- Delivering some of the more practical, less sensitive sessions
- Welcoming and introducing external speakers

Engaging and training leaders, clinicians and equality representatives

Equality Works has been commissioned to provide short tailored training interventions for the Employment Service Group (7th July – 1.5 hours), Clinicians and the Board/ Executive Team (0.5 day each, hopefully in September). These sessions will also provide an opportunity to engage these key people in the strategy and gather feedback and advice for successful implementation.

Evaluating the strategy

Evaluating the strategy is essential if we are to check the take-up of training and measure outcomes from it. Ensuring that each part of the strategy has clear learning objectives, which link to the core equality training competencies, is a vital first step in this process. Focusing on behaviours and actions, rather than on attitudes alone should make these outcomes more measurable.

The following actions are recommended to evaluate the strategy:

- Evaluate the Managing Diversity programme by one or more of the following:
 - Developing and analysing pre- and post-course delegate evaluation forms
 - Requiring delegates to have a pre- and post-training session with their line managers to identify training needs/ learning and agree resulting actions and how these will be performance managed
 - Contact a sample of delegates by phone or e-mail some time after the course to assess longer term impact and identify any changed behaviours or actions
- E-mail a short questionnaire to those completing the e-learning programme a couple of weeks after completion
- Involve champions and/or sisters/ team leaders in gathering information about attendance at bite-sized sessions and reporting any changes or feedback
- Send out a questionnaire to all staff after the first year of the strategy to assess impact, gather information about outstanding training needs, etc. (HR and Learning & Development have already drafted a questionnaire which could form the basis for this).
- Agree a timeframe and reporting mechanism for gathering together, analysing and presenting all this information and revising the strategy in response to it

Appendix: How Equality Works has developed this strategy

We reviewed the following documents:

- Training and Development Programme, 2010-11
- Single Equality Scheme, 2009-12 and the revised Action Plan 2010
- Equality and Diversity Annual Report, December 2009
- Annual Report, Patient and Customer Services Department, 2008-9
- Patient and Family Experience Strategy, March 2009
- CQC Outpatient department patient survey report 2009
- CQC National NHS Staff Survey 2009: summary
- Trust's own analysis of E&D issues arising from the staff survey 2009
- Guide to Training and Development at Stockport NHS Foundation Trust
- 2008 National In-Patient Survey: in-house summary of results
- Picker Inpatient Survey 2009: Final report, Feb 2010
- Picker Out-patient Survey 2009: Final report, Nov 2009
- Notes from Involvement Event at Walthew House, 28th January 2010
- Training and Development Philosophy: process and funding guidelines

The Trust has made the following figures available to us:

- Employees completing Tier 1 (General awareness) and Tier 2 (Advanced level) of the VLE E&D package, Oct 08-Apr09 broken down by business group, six equality strands
- Total number of staff in each business group (to enable interpretation of the above)
- Total number of employees completing Tiers 1 and 2 of the above (April 2009 – Jan 2010)
- Facilities staff receiving in-house Diversity Awareness Programme, Spring 2010
- Managers receiving in-house Diversity Awareness Programme, July 2007-March 2010 (by division/ role)
- Numbers of complaints received under the theme of discrimination (with further breakdown into type of discrimination) between Apr 09 and May 10

We also reviewed the materials for these existing training packages:

- In-house Diversity Awareness Programme
- The VLE Equality and Diversity online learning package

- National NHS core learning E&D online package (brief review)
- Schedule for the 1-week HCA (Health Care Assistant) training programme

We have met with:

- Sue Bell, Vicky Ackers, Gemma Marsh from HR (inception meeting)
- Gill Clarke, Management Development Specialist (Learning & Development Team)
- The Heads of Nursing (2nd June)
- The Employment Service Group (7th July)





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