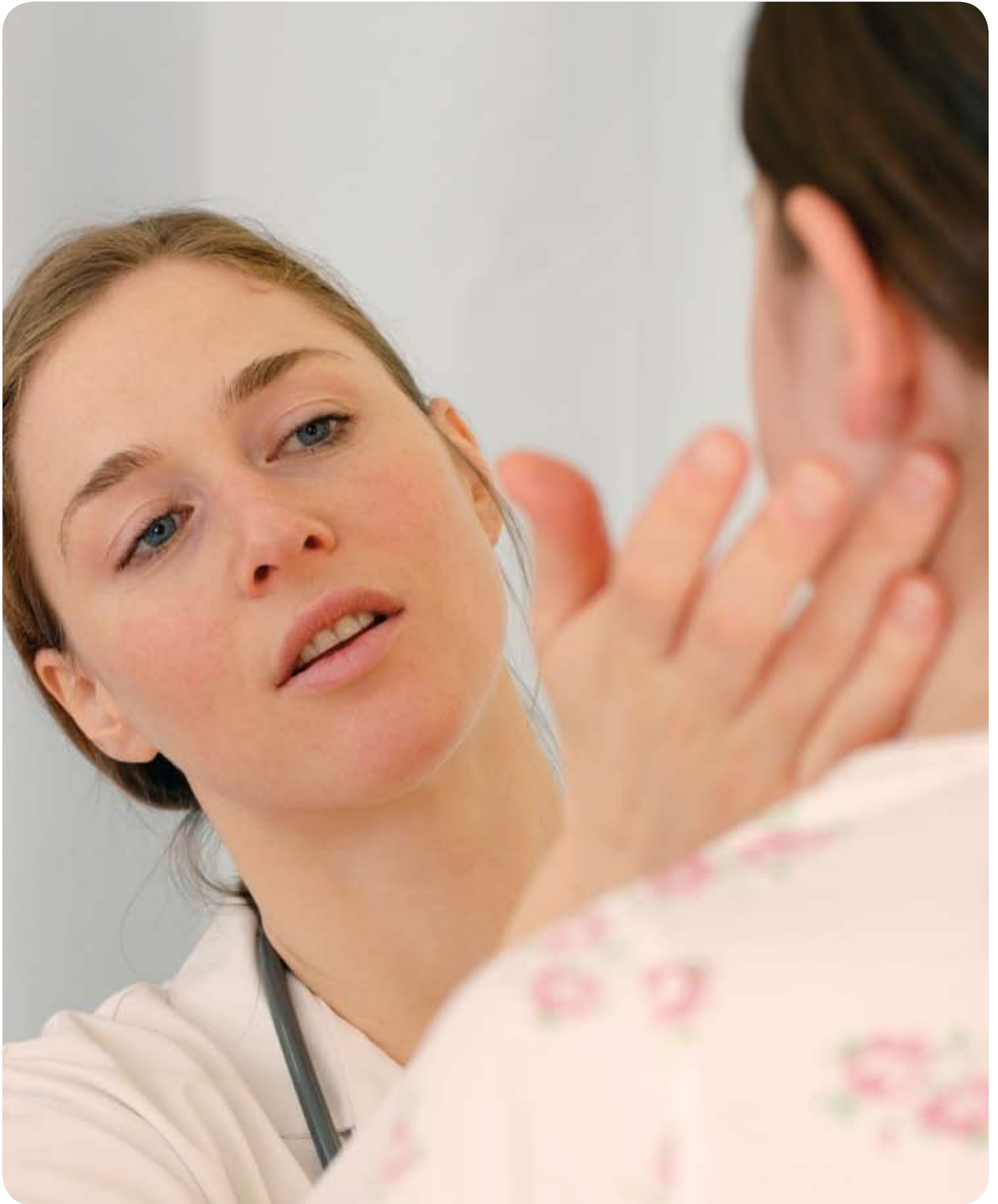


Implementing the matrix quality standard for information advice and guidance services

A guide for healthcare employers



better **skills**
better **jobs**
better **health**



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Introduction

This guide has been written for organisations in the health sector that are considering or actively working towards the **matrix** Standard. It is accompanied by a second booklet: *The matrix quality standard for information and guidance services – what it means to the healthcare sector*, which explains why the **matrix** Standard is relevant to healthcare organisations.

Whether you are just starting out on your **matrix** Journey or it is already underway, you will find this guide of practical help. As well as explaining the different elements of the **matrix** Standard in detail, it also outlines things you may wish to consider and gives practical advice and tips from other health sector organisations who have already achieved **matrix** Accreditation.

Terms used

In the context of the wider health sector and working with the **matrix** Standard, the terms 'service' and 'people' mean the following:

Service can mean the support you provide to people to help them choose the right path in learning, job progression, training and/or personal development issues to suit both your and their needs. This may include some or any of the following (the list is not exhaustive):

- one-to-one discussion
- the Personal Development Review (PDR)
- workshops and group work
- Professional Development Planning as part of an appraisal process
- telephone or intranet/website assistance
- drop-in sessions or job surgeries.

People may, but will not necessarily, include any combination of the following (the list is not exhaustive):

- employees of the trust or health-related business
- volunteers
- subcontracted staff
- students on placement
- clinical and non-clinical staff

The role of Registered **matrix** Advisers

Registered **matrix** Advisers are available to support organisations throughout their **matrix** Journey, or can be called upon at any specific point to help you review your current practices or develop an action plan to get you focused in working towards Accreditation.

They can offer support in a variety of ways, including providing objective advice or offering independent opinion, helping to identify problems or new approaches, action planning or checking your readiness for accreditation.

Healthcare organisations who've achieved **matrix** Accreditation have found the support of Registered **matrix** Advisers invaluable, particularly in interpreting the standards within a healthcare context, or incorporating the elements of the **matrix** Standard into a large or complex organisation.

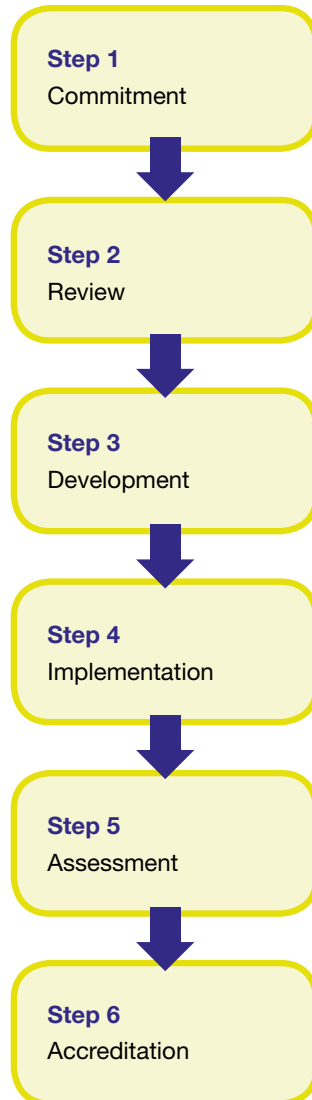
Registered **matrix** Advisers are independent of the body which manages the Standard, and are therefore ideally placed to offer impartial advice on implementing and working with the **matrix** Standard. All are quality assured and work to a rigorous competency framework.

To find an Adviser you can search the Register of Practitioners on the **matrix** Standard website www.matrixstandard.com/aa/theregister.php



The **matrix** Journey

There are just six basic steps from setting out to accreditation.



Adding two additional steps – improvement and accreditation review – ensures that the **matrix** Standard becomes embedded in Careers Information and Advice practice, creating a cycle of continuous improvement.

The elements of the **matrix** Standard

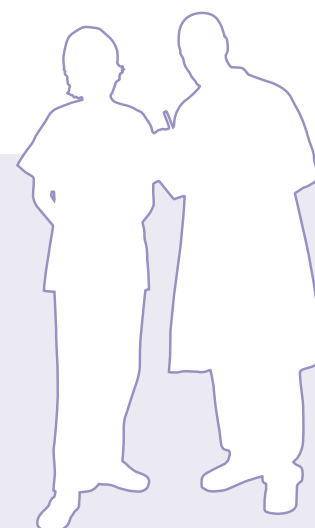
The first four elements of the matrix Standard relate to delivery and the second four to management of the service.

Delivery

1. People are made aware of the service and how to engage with it
2. People's use of the service is defined and understood
3. People are provided with access to information and support in using it
4. People are supported in exploring options and making choices

Management

5. Service delivery is planned and maintained
6. Staff competence and the support they are given are sufficient to deliver the service
7. Feedback on the quality of the service is obtained
8. Continuous quality improvement is ensured through monitoring, evaluation and action.



“As part of deciding whether you want to apply for **matrix** Accreditation you will find it helpful to undertake a baseline check to see how your services would rate against the standards. You may identify gaps that could begin to be addressed prior to starting the actual process. This will give you a strong start and enable you to enter the process with a clearer idea of what your team will be required to do.”

Melanie Warner,
Head of Learning and Development,
NHS Tower Hamlets

The elements explained

1. People are made aware of the service and how to engage with it

Promotion ensures the accessibility of information about the service.



What this element is about

This element is about promoting and/or publicising the service based on a clear understanding of the people you want to attract and the service that is available to them. It involves developing promotional activities and also selecting appropriate methods of communication that are appealing and relevant to the intended users.

It covers key aspects of reaching potential users with essential information presented in ways that are visible and easy to use.

Steps to success

1. Have you defined the service you provide and who is likely to use it?
2. Promoting the service can be done in a variety of ways, so you will need to be clear about who you are trying to promote your service to and what their needs are. This might include members of staff, people you want to recruit and/or learners from your own or another organisation.
3. In practice, how do you go about finding out what they need?
4. How do potential users of your service find all the information they want about the service you provide on any promotional materials you produce or activities you undertake? Have you considered different methods of promotion to ensure that information about your service is accessible to them? For example, do

all staff have access to details of Continuous Professional Development (CPD) and other training for staff at all levels in your organisation? Do you cover this at induction? Are promotional materials available, for example, on ward notice boards, in areas frequently accessed by domestic staff or in your IT department, in the healthcare library or staff eating areas?

5. How do you ensure that your promotional activities are inclusive? For example, does your information reach full and part-time staff, shift workers, contracted staff, volunteers, those who have low literacy skills or do not communicate easily in English? How are they able to find out about what you have on offer?
6. Is your service promoted directly to potential users or is an intermediary 'signposting' agency, department or organisation involved? Can you describe the different promotional activities you undertake for different audiences? For example, do you have any Union Learning Representatives who promote learning to their peers and, if so, how many do you have? How active are they and how does the service engage with them?
7. To what extent could those involved in delivering or managing the service show how people are made aware of and engage with the service?

Criteria

- 1a the purpose, expected users and range of services are defined
- 1b promotional activities provide essential information about the nature of, and support available to access and use, the service
- 1c information about the service is accessible to potential users
- 1d promotional activities take account of equality of opportunity

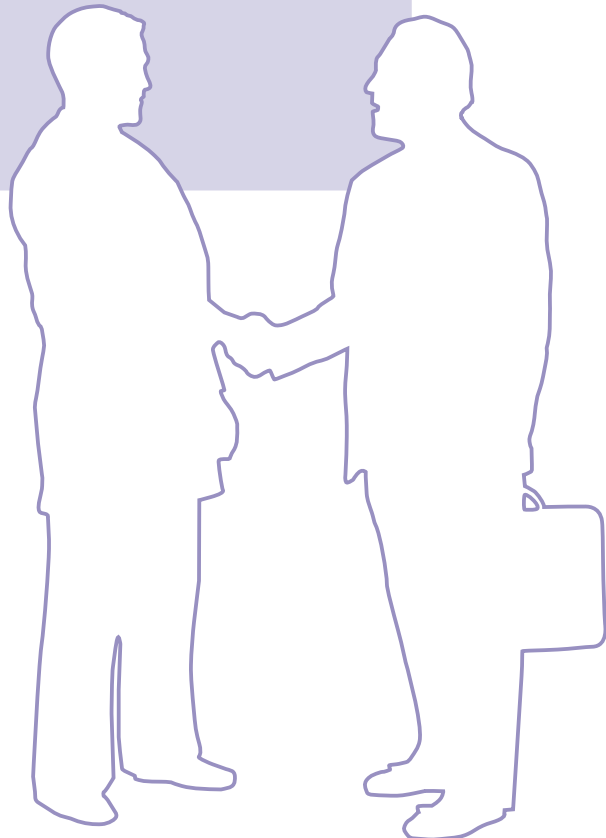
Case study examples

South Tyneside NHS Foundation Trust has ten communication zones within the Trust where promotional material and information about the Careers Information and Advice services are highlighted.

Promotional activities at *Tees, Esk and Wear Valleys NHS Foundation Trust* include producing leaflets, a quarterly newsletter and a website for the training department. They also provide a user-friendly handbook for learners that contains information for both the learner and their manager, such as an introduction to the Workforce Development Team (WDT) and its staff, information on learning programmes offered and the support that the WDT can provide.

“The impact of IAG on our organisation’s key objectives will be reflected in how successfully we implement our five year workforce plan. IAG not only underpins so much of what we do on a day to day basis, it is absolutely key to our workforce plan. For example, over the next five years, we know that there will need to be a growth in numbers of the New Assistant Practitioners role. That means we need to be focusing on the current development of staff in bands 2 and 3, to lift their skills in order to take on these new roles. We need to be providing them with the information and advice they need to make the most of these opportunities.”

Angela Dale,
Workforce Development Manager,
Tees, Esk and Wear Valleys NHS Foundation Trust



2. People's use of the service is defined and understood

Defining and understanding the service available and clarifying key policies and practices.



What this element is about

This element is about describing the key features of the service available and establishing how the service meets individual requirements. It also highlights the importance of being clear about policies on issues of confidentiality and diversity.

It may not be helpful to present a raft of information to service users all at once – you are most likely to select and present information in different, more appropriate ways. The main requirement is to inspire confidence in people using the service.

This element involves identifying people's needs and expectations as well as giving them a chance to decide if the service is right for them. You will need to demonstrate that you signpost and/or refer people appropriately to other services that they might find helpful – this might be for further research into their own development, using healthcare library resources or contacting a professional body that covers their area of work.

You will also need to show how you are responsive to the needs of individuals.

Steps to success

1. A full description of the service may be given over a period of time or by a referring agency, perhaps a different department or site within the overarching organisation or health community. A description may be offered in a variety of different formats. To what extent would users of the service be able to confirm that they fully understand the nature of what you provide?

2. When and how do you provide information about your service and how do you know that it is meeting people's needs and expectations?
3. How do you tell people about links with other relevant services? These other services might be within your own organisation, for example in the healthcare library or learning resource area if you have one. Equally, you might tell people about external provision – for example nextstep network outlets or a local college or university.
4. Are those staff responsible for supporting people in the service clear about your policies on confidentiality and diversity? Could your staff explain them if necessary, and in what other ways do you make this information known to people? For example, you might promote this aspect of your service in information leaflets about what you can offer, when and where.
5. When people make initial contact with your service, to what extent are they likely to feel that they have been dealt with promptly and in a warm and supportive manner?

Criteria

2a people are offered a full description of what they can expect from the service

2b people are made aware of the confidentiality and diversity policies as appropriate

2c people are given the opportunity to explore the suitability of the service to meet their needs

2d people's requirements in relation to the stated service are established

2e people are signposted and/or referred to other relevant services where appropriate

6. Are you helping staff understand what you provide in a way and at a pace that is appropriate to them? Are people able to ask questions and clarify their understanding? Are you giving them space and time to think about what the service can offer them, and to raise any issues or concerns? Do you have a dedicated area and/or specific times when the service is provided in the organisation? If it is a 'drop-in' service or delivered on a number of sites, is it possible to have a confidential conversation?
7. To what extent would a user of the service feel that their needs had been met, that they had been supported effectively and that they had received appropriate information about other services? Does your service contact other organisations and agencies on behalf of a person, and/or do those who provide the service supply written or verbal recommendations for a person's 'next steps'?



Case study examples

Kent and Medway NHS and Social Care Partnership Trust ensures that all staff have an initial introduction to the Careers Information and Advice available as part of an induction undertaken by all new starters. In this two-hour session the Lifelong Learning Manager outlines both her own role and what users can expect from her team.

*“We were determined to ensure quality. At our meetings we looked at information advice and guidance in the context of **matrix**. Everything was **matrix** driven. When we had our assessments and were told we were on the right road and we just needed to tweak a few things it was such a huge boost.”*

Sheila Bull,
Lifelong Learning Manager,
Kent and Medway NHS and Social Care Partnership Trust

An induction system is also in place at *Tees, Esk and Wear Valleys NHS Foundation Trust*, extending this with a programme of study days and information and advice sessions with individuals taking courses ensures that information is given to users over a period of time, and when they need it. The Trust's policies on confidentiality and equal opportunities, and outline of what learners can expect from their team that provide Careers Information and Advice are detailed in their learner's handbook.

“We need to make sure that we are supporting learners through the whole learning pathway, from the very first time we make contact, to the point where they reach the goals set out in their Individual Learning Plan (ILP).”

Brenda Wilson,
Quality Assurance Lead,
Tees, Esk and Wear Valleys NHS Foundation Trust

3. People are provided with access to information and support in using it

Providing information in accessible forms and assisting people to use it.



What this element is about

This element is about communicating clearly and effectively to users of the service through the provision of high-quality, accessible information, and assisting people in its use.

You should ensure that information is appropriate for the service you are providing and takes account of diversity.

There may be different levels of support required in the interpretation and use of information, depending on the type of service and the nature of individual needs. This element is also about ensuring that all information, including that from external agencies, remains current, accurate and free from bias.

You will need to demonstrate active monitoring and management of the information you hold.

Steps to success

1. Can you explain the different ways that information, including relevant technologies, is made available to your users?
2. How do you ensure that your information is always relevant, current, accurate and sufficient for the stated service? Is someone from your service responsible for checking whether publications are out of date and arranging replacements?
3. To what extent does the information you provide reflect the diversity of your target audience?
4. Will your users and staff be able to give examples of how they were given support to understand and make use of information, including accessing networks and other sources of information? To what extent are users supported in having

equal access to resources, for example shift workers or part-time staff? Do people have equal access to computers in the workplace? Are they signposted to where computers and other equipment are situated for their use, for example in the healthcare library or resource area?

5. Have you considered different ways of producing information for people who have accessibility needs – for example large-print versions, or translations if you have a large number of people whose first language is not English. This is particularly relevant for organisations where there are a significant number of staff whose first language is other than English.
6. How are users of the service made aware that there are other ways of accessing information, taking into account their individual needs?
7. To what extent would people receiving the service, and those delivering it, agree that information is readily accessible, relevant to their needs and backed up with support in making use of it?

Criteria

3a information held or accessed by the organisation is sufficient for, and relevant to, the stated service

3b information provided to people is accurate, current and inclusive

3c information is managed and evaluated to ensure that it remains relevant to the stated service

3d people are supported in accessing, understanding and using information through resources appropriate to their needs

Case study examples

Northumberland, Tyne and Wear NHS Trust covers a large area of Northumberland and Tyneside, providing services for people with mental health and learning disabilities. Trust managers are committed to ensuring equality of access to learning. The Trust has embedded initial assessment for skills for life, and one:one IAG sessions, into all vocational programmes. It works in partnership with the ULR led Deal project and held a joint Learners Day to encourage greater participation in learning, whatever people's former experiences

“We know many people get by on a day to day basis, and those from disadvantaged households are seriously under represented at every level of learning and achievement. We want to change that by getting people onto courses that help them develop a love of learning. Once they get the opportunity to start learning, it opens up more doors and their learning begins to widen.”

Michael Dodd,
DEAL Project Lead Union Learning Representative
Northumberland, Tyne and Wear NHS Trust

The Careers Information and Advice service offered at *Gateshead Health Foundation Trust* includes providing help with maths, English and dyslexia support. The Trust has worked to build partnerships with a number of different agencies, including Gateshead LEA, the Northern TUC and Newcastle City Learning, to achieve a **matrix** Standard service which caters for all employees. This in turn has added to the credibility of their services, both internally and externally, especially as the **matrix** Standard is recognised as a prestigious award.

“Much of the focus of the Union Learning Representatives is on widening participation in learning and to support staff to overcome barriers by signposting and providing advice and guidance around the services we have to help remove barriers to learning.”

Mary Darroch,
OD and Staff Development Manager,
Gateshead Health Foundation Trust

Before starting on their **matrix** Journey, *NHS Tower Hamlets* felt that the variety of ways they used to communicate their services to staff was one of their strengths. However, the **matrix** process enabled them to build on this strength by developing and implementing a communication plan, ensuring improved equality and diversity of access to their services.

*“One of our strengths was that we already had in place quite a diverse range of ways to communicate our services to staff. However, the **matrix** process enabled us to see how this could be further enhanced by the development of a Communication Plan that would ensure improved equality and diversity of access to our services.”*

Melanie Warner,
Head of Learning and Development,
NHS Tower Hamlets



4. People are supported in exploring options and making choices

Providing information, advice and/or guidance to assist people in reviewing choices.



Criteria

- 4a people have access to impartial and objective information, advice and guidance
- 4b people are aware of the purpose and limitations of the information, advice and guidance available
- 4c people understand and agree how the support process will be conducted
- 4d options and choices are presented to people in a manner that assists their understanding
- 4e people have opportunities to consider and explore options and are given appropriate support and encouragement during the process
- 4f people are able to make their own choices

What this element is about

This element is about providing appropriate and impartial Careers Information and Advice or support to help people review alternative courses of action. It involves making sure that people understand and agree to the process itself and understand any limitations of it. It also involves presenting options and choices in a clear and helpful manner to aid individual understanding, as well as giving people encouragement to explore their options.

The process should be a supportive one that also ensures that the individual remains in control when making any final decisions. This will mean presenting options in a way that allows people to make informed choices and maintain an appropriate level of self-determination and autonomy. It may be impossible to guarantee the total impartiality of all information held, given the range of sources available and the various methods of accessing it, including the internet. However, it is important that people using the service are aware of any limitations in this respect.

Steps to success

1. What do you do to ensure that Careers Information and Advice or support provided by you is free of bias? For example, would you always refer individuals to in-house training programmes even though an external agency may provide the same programme at a time and venue more suited to an individual's needs?
2. What is your process for making the purpose and limitations of Careers Information and Advice activities clear? In considering limitations, you would need, for example, to tell people if information resources were being updated, to ensure that they understood that what was available was not current and might contain inaccuracies.

3. Do you provide sufficient information prior to a planned PDR, to help people understand the process and facilitate their preparation for the review discussion?
4. How do people delivering the service check that individuals have understood the options open to them and the consequences of alternative courses of action? Are people encouraged to provide feedback following a PDR, and do they appreciate that the service can help them investigate options in the resulting PDP that have been agreed by the individual and their manager?
5. What options and choices do people consider and why? Are these presented in a manner that gives them the knowledge and time to arrive at their own decisions? To what extent are they supported and encouraged in their exploration of options? For example, are people who have achieved level 1 in one or more dimensions of their job outline given the information they need to support their progression to level 2, and hence to progress to full competency? If they wish to develop further, are people made aware of other job options they might investigate once they have achieved the level of competency required by their current role? Can you provide examples of this sort of progression?
6. Can you describe how individuals have benefited from exploring different options, which might include signposting and referral to someone or somewhere else for further help? For example, did the exploration result in a secondment to another job role, additional responsibilities, a job share or other changes? Did the changes involve further discussions with staff in the HR department?
7. To what extent could those using the service give examples of how they were supported in exploring options and making choices?

Case study examples

Embarking on workforce development activities, the *Royal Devon and Exeter NHS Foundation Trust* introduced the Higher Professional Diploma in Health and Well-being alongside Skills for Health competences as a way of developing progression routes into the new Assistant Practitioner role. The **matrix** Standard helped to inform and advise employees about their professional development routes.

“We recognised that a successful strategy for widening participation should include information, advice and guidance that underpins and supports this agenda. IAG ensures that staff are supported to make informed decisions about their development, and ultimately, that the Trust’s workforce plans are delivered.”

Vera Byfield,
Head of Learning and Development,
Royal Devon and Exeter NHS Foundation Trust

At *Tees, Esk and Wear Valleys NHS Foundation Trust* a structured system of support that every learner signs up to at the start of their learning pathway. This includes an initial Careers Information and Advice session with two further reviews, one in the middle of the pathway and one at the end. This ongoing IAG support is vital.

“People’s ideas change! Their goals at the beginning of a learning pathway may not be the same at the end. Often, as a learner’s confidence increases, their aspirations are raised and from initially beginning an NVQ programme with some trepidation, end up wanting to access higher level courses and opportunities. You need IAG not only to ‘trigger’ a need but also to support the development of those needs.”

Angela Dale,
Workforce Development Manager,
Tees, Esk and Wear Valleys NHS Foundation Trust



5. Service delivery is planned and maintained

Defining measurable aims and objectives and setting up systems to deliver the service.



What this element is about

This element is about defining aims and objectives for your service, which should be aligned with the organisation's overall business objectives, such as implementing the Knowledge and Skills Framework (KSF) and Agenda for Change, achieving Improving Working Lives (IWL) Practice Plus targets, and achieving or maintaining Investors in People (IiP) recognition. Clear direction and leadership on what the service aims to achieve is given from the top of the organisation.

As well as using appropriate systems, policies and practices, effective delivery of the service may also involve working with key partners such as trade unions, careers services such as Careers Wales, Careers Scotland, the Northern Ireland Careers Service and Connexions and nextstep in England, professional bodies, voluntary and community-based organisations, higher and further education institutions. Organisational partnerships will be varied and could include those who contribute to your funding such as the Strategic Health Authority (SHA), other service providers, contractors and agencies running specific programmes.

High-quality service delivery will involve the provision of appropriate resources and the effective management of them. Your service will also need to ensure an appropriate response to relevant legislation, codes of practice and ethics, including disability discrimination and freedom of information laws.

One way of ensuring effective internal management of the service is to have a clear set of performance measures against which the effectiveness of individual systems can be evaluated. A key aspect of effective management is the ability of the service to engage its staff in the review and improvement of service delivery. This is crucial to all aspects of the service.

The measurement of service effectiveness is central to future success and development. The measures of success that you choose to track will need to relate clearly to the stated service provided and the reasons for its existence. The perceptions of a wide range of individuals and organisations could be included in this measurement, depending on the nature of your service and what it provides.

Criteria

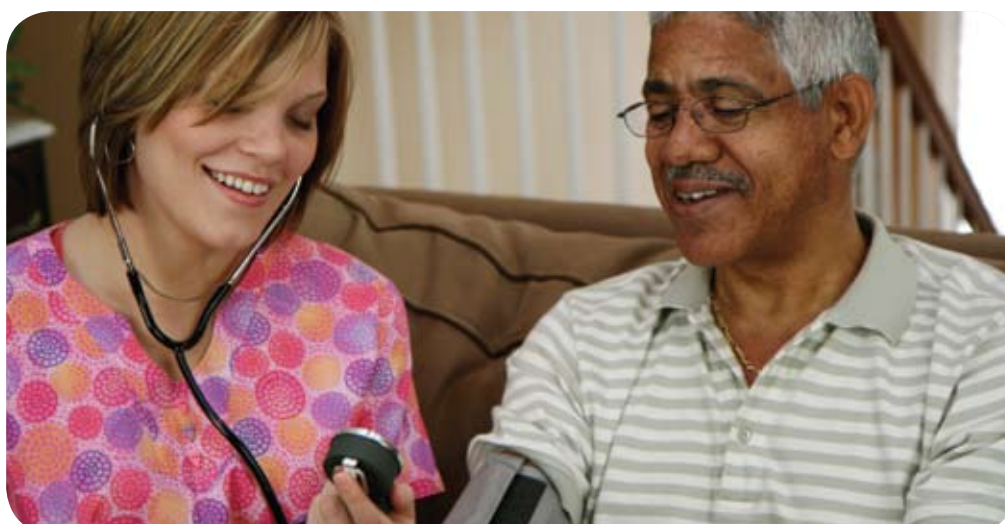
- 5a the service has clearly defined measurable aims and objectives
- 5b the service is given clear leadership and direction
- 5c the views of those delivering the service inform service planning and delivery
- 5d the internal management of the service ensures that resources are appropriate and effectively used
- 5e the service identifies and responds to relevant legislation, codes of practice and ethics
- 5f there are defined policies and practices for service delivery, incorporating the principles established by the National IAG Board
- 5g the service has established appropriate partnerships and networks

Steps to success

1. How are aims and objectives set for your service? Who is involved? How are the aims and objectives reviewed and how do you communicate a clear direction? This may be via published documents setting out the mission, vision and values within a business or development plan. Alternatively, sustaining the direction may rely heavily on verbal communication. To what extent are those delivering the service involved in the strategy and planning of its delivery? If asked, would they be able to explain how the stated aims apply to their role?
2. It is for you to identify the codes of practice and ethics most relevant to your service. Whatever principles you are working to, how do you translate these so that everyone involved in service delivery can relate to them, and how do you know they are understood? Within your service, will people be able to describe what they do to ensure diversity or confidentiality? How are principles woven into policies and practices, and what are the arrangements for communicating them to those

delivering or receiving the service? Can you describe how you ensure that policies and practices are reviewed and kept up to date, and how changes are notified?

3. To what extent have partnerships and networks been created and what are the outcomes? For example, if partnership working has led to formal or informal agreements that provide strategic and operational benefits, how are these monitored? Has partnership working enabled wider access and participation, for example by reaching out to minority ethnic groups or to people who have disabilities, or by being able to provide a more comprehensive service to those with low skills by working with a local nextstep network? Have networks assisted the sharing of good practice and learning opportunities for those delivering your service, for example improving delivery skills and techniques by running shared training sessions?



Have those working in your service taken the opportunity to raise awareness of the recruitment needs and issues affecting the health sector with a wider audience? What sort of partnerships have you established within your own organisation? Do you work with any e-learning groups in your own organisation or across a wider strategic area, or with Skills for Health groups across the wider health community? Do you have a CPD lead who meets with others across the health community and do you contribute to their agenda? Are you part of the network meeting about JIF developments?

4. To what extent would those involved in the delivery or management of the service be able to describe its aims, objectives and overall direction, and understand how to communicate their views to contribute to service improvements?
5. How do you keep up to date and respond to relevant legislation and codes of practice? How do you

share such information with those involved in delivering the service, for example in whichever ward, department, outreach facility or site they are working in?

6. How do you ensure that the premises, environment and equipment used to deliver the service are appropriate and sufficient to meet the relevant needs? For example, if confidential Careers Information and Advice interviews are offered, how do you ensure sufficient privacy? If access is limited, what alternative arrangements do you make for people with mobility problems or those with a visual impairment?
7. How do you plan and resource the appropriate provision of all resources required? How are the resources managed to ensure that they are used effectively?



Case study examples

There are successful stories of Trusts not only using the **matrix** Standard to demonstrate their commitment to achieving Investors in People or Improving Working Lives Practice Plus, but also of getting **matrix** accreditation at the same time as one of these other standards.

South Tyneside NHS Foundation Trust had held the Investors in People standard for several years before deciding to gain the **matrix** Standard and re-accreditation for IIP together. As part of their third re-accreditation process they mapped the **matrix** Standard into Investors in People. As this was so well established in the Trust, they found that there was a lot of similarities between the two standards – both in terms of the questions asked and the evidence required.

“The workforce won’t stand still; it has got to keep moving ahead. But that requires a quality of input and that’s why quality standards are key to this Trust.”

Clive Spencer,
Training and Development Manager,
South Tyneside NHS Foundation Trust

Warrington and Halton Hospitals NHS Foundation Trust had a similar experience when they decided to start the **matrix** Journey a year after achieving the Improving Working Lives Practice Plus Standard. The evidence that had been produced for IWL contributed greatly to the evidence they needed for **matrix** Accreditation.

*“This term reflects our approach to **matrix** and ensures that everyone in the team is aware of why **matrix** Accreditation continues to be a key part of its strategic way forward.”*

Wendy Johnson,
Head of Clinical Education,
Warrington and Halton Hospitals NHS Foundation Trust

The management of the service does not sit exclusively within the team actually delivering Careers Information and Advice. At *Basildon and Thurrock University Hospitals NHS Foundation Trust*, Careers Information and Advice features explicitly in the directorate’s service (business) plan. It also features in some of the organisation’s key policy documents, such as those relating to the personal development review process for example.

This approach has led to a greater understanding of the benefits of moving from providing Careers Information and Advice on an informal basis to a more formal one. Gaining proper recognition for the good work already being done has helped to ensure that – from board level down – the organisation had a solid understanding of the relevance and benefits of Careers Information and Advice. As a direct result, continuing developments ensue.

“We’re currently planning our latest e-learning strategy and considering how new technologies can support Careers Information and Advice processes. For example, how it could assist in evidencing our Careers Information and Advice activity.”

Jayne Toplis,
General Manager Staff Training & Development
Basildon and Thurrock University Hospitals NHS Foundation Trust

*“You need to gain the support of the senior management team, at the highest level. Part of the assessment process is that **matrix** Assessors will want to speak with the Chief Executive and other senior managers.”*

Melanie Warner,
Head of Learning and Development,
NHS Tower Hamlets

6. Staff competence and the support they are given are sufficient to deliver the service

Maintaining and developing the competence of those delivering the service.



What this element is about

This element involves identifying, maintaining and developing the competence of all staff who deliver the service. It covers induction for new staff or those new to their role, including volunteers; ongoing supervision and support processes; how performance review is undertaken and the arrangements and procedures for training and development.

In the case of an external service, competence would relate, for example, to an adviser who should be inducted and trained appropriately to deal with people's needs and enquiries from a range of organisations, not solely within their own.

In the case of an internal service, this might be an HR manager or learning centre manager who provides coaching or conducts appraisals or PDRs with members of their team, for example. It would, therefore, be important that this manager receives appropriate training, support and performance appraisal to ensure effective delivery of their internal staff support role.

Regardless of the size of the service, all staff should have clear reporting lines and adequate opportunities for support from others within the organisation. For example, if the service is delivered by training and development staff, learning centre staff and Union Learning Representatives, consider the lines of communication and opportunities to share good practice between all those involved in delivering the service.

All staff should have the opportunity to identify their development requirements in relation to their contribution to the

service provided to users. They should then be provided with opportunities to develop the necessary skills. For example, can you link in with your local nextstep organisation or careers service to access some of their information, advice and guidance development opportunities and/or do you use a specialist independent consultant to expand the skill set of your service delivery staff? Is there any work shadowing between staff from different areas of your service delivery?

Steps to success

1. It is important that those delivering the service understand what that service is about and their contribution to it. It is also vital that they are aware of their rights and responsibilities. To what extent do people within the service have a clear understanding of their role? What procedures are in place to ensure that any gaps in their knowledge are addressed? For example, are staff appropriately trained to take on the role of mentoring, monitoring or advising people?
2. How do you maintain and develop the competence of your staff? For example, are there opportunities for them to share good practice or explore issues during team or management meetings? Where staff deliver across multiple sites, how do you keep them up to date with information affecting the advice they provide – for example, training opportunities provided by your own organisation? If you have volunteers delivering the service, how do you address their needs?

Criteria

- 6a staff are given an induction into the service and their role within it
- 6b the competence of staff is maintained and developed to meet service demands
- 6c staff recognise the boundaries of their role in relation to the service and seek appropriate support
- 6d training and support in the use of equipment is provided
- 6e supervision and support are provided to staff
- 6f staff can describe how they are involved in reviewing their performance and identifying development needs linked to objectives

3. How are staff supported in their self-awareness in terms of competence and performance? For example, how do they acquire awareness of their limitations in particular aspects of the role and how are they supported in developing further, for example with clear guidelines on how to signpost or refer to other more appropriate services? How do you maintain and develop the competence of your staff to meet the demands of the service?
4. With regard to the Careers Information and Advice services provided, how and when do you review the performance of those delivering that service at whatever level? Can you give examples of how this review process is linked to tangible outcomes? What arrangements exist for shorter-term support and supervision, for example through one-to-one meetings? How can staff seek help, for example through intranet access, publications or direct personal contact? What supervisory support mechanism(s) are in place to support staff?
5. When training and development needs for a member of the service delivery staff are identified, how are these addressed? For example, is there a planned and budgeted approach? How do you determine the support they might need?
6. To what extent could a member of staff confidently describe how their competence is maintained and developed in line with the requirements of the service?

Case study examples

*Basildon and Thurrock University Hospitals NHS Foundation Trust found that including all of their staff involved in providing Careers Information and Advice from the start of their **matrix** Journey helpful in ensuring that each member of the team understood their role and its importance,*

“In order to ensure that the team owned and understood Careers Information and Advice as a shared responsibility (albeit at different levels) we decided on a ‘bottom up’ approach. Each team member had to come up with ways to evidence the standards. This meant that they had to think about their roles and how Careers Information and Advice fits. And in such a way that we could articulate the standards.”

Jayne Toplis

General Manager Staff Training & Development,
Basildon and Thurrock University Hospitals NHS Foundation Trust

“We decided that our WILSON’s ULR Co-ordinator and several other ULRs would benefit from attaining an Advice and Guidance qualification and they became very much part of the process of achieving the award. From their point of view, it gave them more confidence to support staff to make informed choices about their own learning, which would fit with their particular learning styles.”

“We now have two managers, two NVQ Internal Verifiers and three ULRs who have successfully attained their OCR qualification in Advice and Guidance to level 4 and a Training Assistant who has qualified at level 3. Having taken this step, we can be more confident we are applying best practice in IAG with NVQ candidates, Skills for Life learners, coaching practitioners and other staff who need support.”

Mary Darroch,

OD and Staff Development Manager,
Gateshead Health Foundation Trust

7. Feedback on the quality of the service is obtained

Obtaining feedback from users of the service, those involved in delivery of the service and other agencies.



Criteria

- 7a people are advised of who to contact with a compliment, complaint or suggestion and how these will be handled
- 7b people are advised of how their views on the service can be fed back
- 7c organisations proactively seek the views of service users, staff and other agencies to evaluate regularly the quality of the service
- 7d formal and informal comments on the service are evaluated and acted upon as appropriate

What this element is about

This element looks at how you obtain feedback from people using the service, deliverers of the service and other agencies and then act on it to inform the way the service is developed and improved in the future.

You need to ensure that people know how they can provide feedback about the quality of the service. This involves actively encouraging people to provide compliments about how the service has worked well, as well as giving suggestions for improvement.

This element is also about showing how the organisation actively seeks ways of gathering feedback from users to ensure satisfaction with the quality of the service. You need to demonstrate that being able to identify and respond to aspects that fail to meet users' needs is considered critical to the improvement and delivery of high-quality services.

Steps to success

1. You should consider the best methods for gathering feedback from service users. How do you seek feedback from the different people using your service, irrespective of their different needs? This could include feedback from those providing the service as well as from those using it, from partner organisations or other stakeholders such as the SHA, health trusts, general or dental practices, social services, and – if patients are involved – the Patient Advice Liaison Service (PALS). How do you inform people about feedback mechanisms and positively encourage them to review the quality of the service?

2. Can you describe how views are actively treated as an essential element in deciding on service provision? Can you show how you have a consistent approach to consultation and user involvement, and how you review the effectiveness of the methods used to gather feedback?
3. What is the system for handling complaints? You will be expected to describe how you deal with matters that may not be classified as formal complaints but that indicate concern. What examples would you give that show how you act on concerns effectively and how you have modified your practices in the light of concerns expressed by people using the service?
4. How do people involved in delivering or managing the service get to hear about compliments that users have given about the support they received? How is this information fed back into future planning or development of the service?
5. Would those delivering or managing the service be able to describe how all feedback is linked into the planning of service delivery and continuous quality improvement? Do you invite comment from staff involved in delivering the service, at whatever level and wherever it is delivered across the health organisation?
6. To what extent could staff delivering your service provide examples of where feedback has been used to improve the effectiveness of that service?
7. How do you review and evaluate both formal and informal comments made about your service? What action is taken as a result of these?

Case study examples

At *Tees, Esk and Wear Valleys NHS Foundation Trust* the system of evaluating their Careers Information and Advice service is built into the learner's pathway – for example, evaluation sheets are given to learners, or sent out, after teaching and support sessions so that both managers and learners can feed back their views, including those on their Careers Information and Advice experience. This ensures that problems or complaints are identified and dealt with as soon as possible. The Trust also includes a 'you said, we did' section in their quarterly newsletter where the team can show how and where they are responding to feedback in practical ways.

“Evaluation and feedback is an integral part of our system of learner support. We want to show learners and managers how we are continually trying to make improvements to the ways in which we support learners to achieve their goals.”

Brenda Wilson,
Quality Assurance Lead,
Tees, Esk and Wear Valleys NHS Foundation Trust

Through implementing the **matrix** Standard, the *Ipswich Hospital NHS Trust* has been able access valuable feedback from users which has been used to improve practices within the Trust itself.

“We found the feedback obtained from users particularly helpful and felt that this validated the work that we had been doing.”

Ipswich Hospital NHS Trust



8. Continuous quality improvement is ensured through monitoring, evaluation and action

Evaluating the effectiveness of the service and planning improvements.



What this element is about

This element is about identifying and using effective measures to monitor how your service is doing. It involves engaging with users, staff and other agencies to evaluate the service being delivered and using feedback to inform future plans.

Any service performing all the functions described in this booklet, and monitoring itself effectively through appropriate evaluation activities, will be well on the way to ensuring continuous quality improvement. It is vital that the results of the evaluation are acted upon and that measures are taken to improve provision.

Your service needs to make a realistic judgement about what the key indicators of success are, and to decide what systems are needed to collect the relevant information about them. You will also need to demonstrate how you reconsider plans in the light of changed circumstances and new priorities.

Steps to success

1. You need to be clear about the critical aspects of service delivery that you intend to measure to determine success. What range of measures do you have in place to help you assess the 'health' of your service? Are they appropriate and related to your service aims? Measures could be hard or soft – a hard measure could be demonstrating that successful completion on recognised paths of learning are quantified or that staff turnover has reduced as a result of improved staff support; a soft measure could be the comments that users of the service pass on via a suggestion box or

satisfaction survey, or targeted comments on the support people receive from the service to help them prepare for their PDR, appraisal or to tackle their new course of learning.

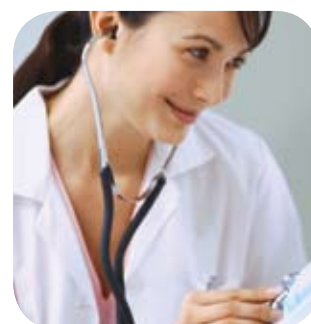
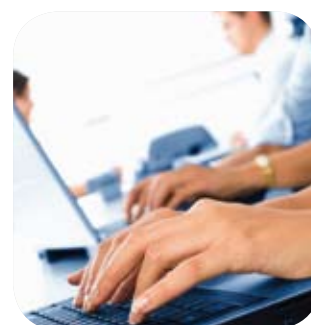
2. What different business review activities do you undertake that contribute to your overall evaluation and to continuous improvement of the service? How do you monitor and evaluate the effectiveness of the service in line with aims and objectives?
3. It is important to be able to show that you can respond to changing circumstances and can prioritise actions to develop your service within the scope of your organisational resources. Would you be able to explain how you have used feedback to evaluate the service and have consequently chosen to change or develop some things and not others?
4. Would you be able to provide examples of where you have learnt from your mistakes? Can you provide examples of how you are planning and improving the service for the future and how feedback has influenced this?
5. To what extent could someone involved in the delivery or management of the service illustrate how they monitor whether appropriate action has been taken to contribute to continuous improvement?

Criteria

- 8a effectiveness is regularly monitored and evaluated against the aims and objectives of the service
- 8b feedback ensures that the effectiveness of the service to individuals is regularly monitored and evaluated to inform continuous improvement
- 8c appropriate action is taken to improve the service to individuals
- 8d the service is continuously developed and improved

6. How do you assess the effectiveness of your service and ensure that resources are used well? Can you describe the arrangements you have in place for monitoring performance against your aims and objectives through channels such as team meetings and management meetings or at board level? Can improvements in the use of resources be demonstrated verbally, visually or on paper? How have shortfalls in

service delivery been analysed and addressed? Can you demonstrate how patient care has benefited from enhanced training and learning opportunities undertaken by front-line staff? If, for example, you are working in an acute trust, a teaching primary care trust (PCT) or a mental health trust, how do you manage the fact that those involved in the service may be on different sites or in different departments?



Case study examples

Developing ways of monitoring and evaluating progress is an integral part of the **matrix** Journey and this offered *Northumberland, Tyne and Wear NHS Trust* the opportunity to demonstrate the impact in a very practical way. Having gained the **matrix** Standard, the Trust was able to obtain a Train to Gain contract via the Learning and Skills Council adding further weight to their justification of the initial costs and time commitment.

*“No matter how large or small an organisation is, the **matrix** Standard offers a quality process that can impact on the development of the whole organisation”*

Annette Connor,
JIF Co-ordinator and IAG Manager,
Northumberland, Tyne and Wear NHS Trust

Evaluation of the TIAG services provided by the University Hospitals of Leicester NHS Trust is an ongoing process. Along with external reviews arranged by nextstep, the team are also proactive in their approach to evaluating both the quality of the service itself and also its impact on individual members of staff. Most recently, the team has begun to arrange learner forums that enable them to get the perspective of users of the service. However, the Trust recognises that there are always improvements to be made, as part of the **matrix** quality cycle.

“As part of our action plan for re-accreditation, we need to build on our current evaluation processes by finding ways to measure the impact of our activity on the organisation, as well as the individual. Whilst this poses quite a challenge for us we know that being able to illustrate return on investment will only strengthen an already well utilised and highly regarded TIAG service.”

Sharon Baines,
UHL's Training and Development Manager and TIAG Adviser,
University Hospitals of Leicester NHS Trust

Contact details

If you are interested in learning more about gaining the matrix Standard for your organisation, or to find out about Registered matrix Advisers in your area, please contact ENTO by either:

- calling the **matrix** Standard enquiry line on **0870 770 2468**
- visiting the website at **www.matrixStandard.com**
- emailing the matrix Standard team at **info@matrixStandard.com**
- writing to **ENTO, Kimberley House, 47 Vaughan Way, Leicester, LE1 4SG.**

A Glossary of Terms used within this guide can be found at the back of its sister publication, ***The matrix quality standard for information advice and guidance services*** – *what it means to the healthcare sector.*

Thank you

Our thanks to the following organisations who shared their experiences with us:

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Ipswich Hospital NHS Trust

Kent and Medway NHS and Social Care Partnership Trust

NHS Tower Hamlets

North East Strategic Health Authority

Northumberland, Tyne and Wear NHS Trust

Royal Devon and Exeter NHS Foundation Trust

South Tyneside NHS Foundation Trust

Tees, Esk and Wear Valleys NHS Foundation Trust

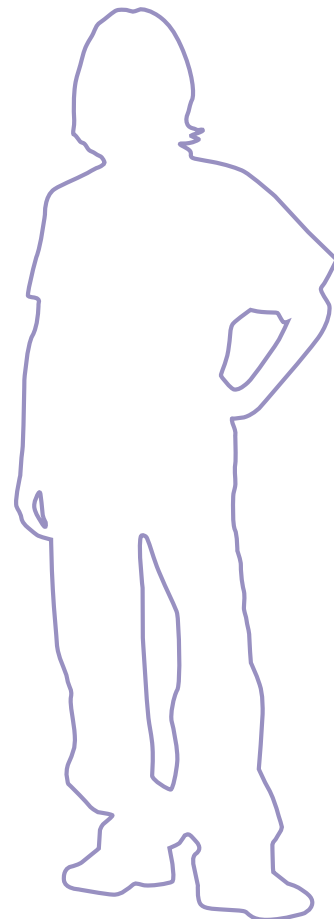
University Hospitals of Leicester NHS Trust

Warrington and Halton Hospitals NHS Foundation Trust

For any other enquiries please contact

Skills for Health
1st and 2nd Floor
Goldsmiths House
Broad Plain
Bristol
BS2 0JP

Phone: 0117 9221155
Email: office@skillsforhealth.org.uk
www.skillsforhealth.org.uk





Skills for Health (Head Office)
Goldsmiths House
Broad Plain
Bristol
BS2 0JP

Tel: 0117 922 1155
Fax: 0117 925 1800
E-mail: office@skillsforhealth.org.uk
Website: www.skillsforhealth.org.uk



ENTO, Kimberley House
47 Vaughan Way
Leicester
LE1 4SG.

Tel: 0870 770 2468
E-mail: info@matrixStandard.com
Website: www.matrixStandard.com

