Call for Applications for Demonstration Site Projects for Nursing Human Resources Planning

October 9, 2007

Ministry of Health and Long-Term Care
Nursing Secretariat
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Introduction and Background

Introduction

The Ministry of Health and Long-Term Care (MOHLTC) Nursing Secretariat is seeking applications from health care organizations across all sectors that are interested in becoming demonstration sites for designing, implementing, evaluating and disseminating nursing human resources (HR) planning tools and practices. The development of nursing HR tools and practices will assist in creating additional capacity for broader health human resources (HHR) planning on a sustained basis. The MOHLTC has allocated $3M for this initiative for a minimum of 12 demonstration site projects that broadly reflect the Province of Ontario’s diverse healthcare sectors, organizations and regions.

This package includes three additional documents to assist applicant(s) in completing their application:

1. Guide for Demonstration Site Projects for Nursing HR Planning
2. Schedule A: Notice of Intention to Respond
3. Schedule B: Application to become a Demonstration Site Project for Nursing HR Planning

Background

Ontario has recognized that improved access to health care services can only be achieved if the province has the right number, mix and distribution of appropriately educated nurses, doctors, and other health care professionals working in the province to deliver quality patient care.

The multifaceted nature of health human resources suggests the need for coordinated interprofessional approaches to health human resources planning. Interprofessional care is one response to the Ontario government’s priority of making the health care system more sustainable and effective. There is mounting evidence that an interprofessional care environment may offer multiple benefits including increased access to health care, better use of clinical resources, easier recruitment of caregivers, and lower rates of staff turnover.

As in other jurisdictions, changing demographics, patterns of health service utilization and aging workforces have created challenges related to the supply of health care professionals. In Ontario, these shortages are felt across professional groups and specialties, in interconnected sectors, and across geographical areas and communities. These challenges are not formed in isolation and cannot be addressed in isolation.

Traditional approaches to address these challenges have tended to revisit issues of scope of practice, remuneration, and education capacity, to name a few. The ministry’s Health Human Resources Strategy Division (HHRSD) was formed to help foster a more progressive approach across the province and consider how each of these factors interacts as a whole. The Division has undertaken a comprehensive approach that includes:

- Enhanced capacity for human resource demand modeling for planning purposes;
• Increased supply through expansion of education seats and bridge training programs for internationally educated health professionals; and
• Strategies to improve practice environments for the purpose of enhancing labour market engagement within the province and organizations including: a provincial approach to marketing and recruitment of health care professional opportunities, healthy work environment initiatives, improved safety for health professionals, interprofessional approaches to care, greater employment stability (e.g. access to full-time jobs), and ongoing professional development opportunities such as expanded roles, career laddering, and the introduction of new provider roles.

In May 2006, the MOHLTC announced the “New Graduate Promise.” With this announcement, the government committed to providing every 2007 Ontario nursing graduate (Registered Nurses and Registered Practical Nurses) with the opportunity to work full-time in the province. To this end, the Minister convened a Task Force to provide recommendations on how to implement this promise. Highlights of these recommendations include:

• Improving employers’ capacity for health human resources planning;
• Increasing expectations that employers adopt innovations that will create full-time employment (to achieve efficiencies in scheduling and improved utilization of the workforce); and
• Supporting the distribution of new nursing graduates across all sectors, particularly in areas where recruitment has been a challenge in the past.

A broader public announcement took place in February 2007, during which more implementation details about the initiative were provided to deliver on the initial promise. After this announcement, the initiative was formally referred to as the Nursing Graduate Guarantee (NGG) and the online portal was launched.

The Challenge

To address the recommendations noted above, the Task Force struck an Employer Capacity Building Working Group, consisting of representatives from nursing employers, associations and unions across the continuum of care. The Working Group identified the following challenges:

• There is wide variability in HHR planning capacity across the province;
• Many organizations currently perform elements of HHR planning, but to varying degrees;
• Little is currently known about the ability of health care organizations to undertake HHR planning;
• Many tools and models exist to support HHR planning but it is difficult to know which ones are the most effective;
• The problem is complex, but potential solutions need to be simple and easy to implement;
• Not all organizations across the continuum of care have the same infrastructure to support effective HHR planning;
• Different sectors face different challenges in HHR planning which will require different solutions; and
• Greater support and knowledge transfer is required to support mid-level managers in effectively developing, implementing, managing and evaluating HHR plans.
To address these challenges and support the government’s commitment, the MOHLTC will be funding demonstration site projects that will increase employer capacity for nursing human resources planning and support the creation of more full-time nursing positions. HHR planning plays a key role in Ontario’s ability to successfully recruit and retain health care professionals in the province. Further, these demonstration site projects will help employers improve their practices in areas that will have the greatest impact on workforce utilization.

The MOHLTC is soliciting applications from health care organizations across all sectors that are interested in becoming demonstration sites for designing, implementing, evaluating and sharing innovative HHR planning tools and practices in one or more of the eight workforce planning building blocks listed below in no particular order (please see p. 5 of the “Guide for Demonstration Site Projects for Nursing HR Planning” for more details on these building blocks):

- Building Block 1 – Retention;
- Building Block 2 – Nursing Managers’ HR Interventions;
- Building Block 3 – Professional Practices / Interprofessional Collaboration (IPC);
- Building Block 4 – Labour Relations & Negotiations;
- Building Block 5 – Planning Tools;
- Building Block 6 – Succession Planning;
- Building Block 7 – Recruitment; and
- Building Block 8 – Service Delivery Models.

The remainder of this document provides the following guidelines for health care organizations interested in become demonstration sites:

- Goal, Objectives, Desired Outcomes and Guiding Principles of the Initiative;
- Mandatory Eligibility Criteria for Application;
- Application Process and Key Dates;
- General Terms and Conditions;
- Frequently Asked Questions; and
- Applicant Checklist.

Goal, Objectives, Outcomes & Principles

Goal of the Initiative

The goal of this initiative is to identify health care organizations across all sectors that are interested in becoming demonstration sites for designing, implementing, evaluating and sharing innovative HHR planning tools and practices. The identified organizations will develop HHR tools and practices that will assist in creating greater system capacity for broader HHR planning on a continued and sustained basis.
System-level Objectives of the Initiative

a) To enhance existing organizational HHR plans;
b) To design, develop, adapt/improve and test specific HHR tools and practices;
c) To foster inter-organizational collaboration, learning, knowledge transfer and exchange on HHR planning;
d) To establish a pool of tested and validated HHR tools, practices and implementation strategies, and to disseminate these tools across the province; and,
e) To support informed decision-making at the organizational level as it relates to HHR planning.

Desired Outcomes of the Initiative

• Increased knowledge base in HHR planning including innovation in HHR planning across sectors and professions;
• Provide a mechanism for provincial knowledge transfer, dissemination and collaboration;
• Improved effectiveness of HHR planning across health care sectors;
• First opportunities created for a LHIN-based approach to recruitment and retention;
• Establish metrics for HHR planning;
• Increased employer capacity to absorb additional full-time nurses; and,
• Improved patient outcomes, decreased staff turnover, and increased cost savings from HHR related areas.

Guiding Principles

• Pursue a balanced approach between system, organization and patient outcomes;
• Support for multiple health care sectors (acute care, long-term care, community, primary care and public health);
• Projects will build on existing or new partnerships; and
• The process will encourage a breadth of design, development, and adaptation of HHR tools and practices based on the framework of building blocks.

Who May Apply

Applications for funding for demonstration site projects in HHR planning are open to any organization funded by MOHLTC for the purpose of delivering health care services in any health care sector: acute care, long-term care, community, primary care and public health. Private sector partners or health care associations are eligible applicants, but their partnership must have a MOHLTC-funded health care provider as the lead applicant.

The MOHLTC will take into consideration factors including organizational size, geography and sector, among others, in evaluating potential applicants. It is the intent of the MOHLTC to have a diverse cross-section of demonstration sites that are representative of the province as a whole and of organizations across the spectrum of readiness for health care planning.
Mandatory Eligibility Criteria

To be eligible for selection as a demonstration site, all applicants must meet the following mandatory eligibility criteria as part of the application process:

1. Propose a New or Existing Partnership

To promote sharing and collaboration, each applicant’s proposed demonstration project should include a new or existing partnership. New or existing partnerships may include one or more of the following, as appropriate:

- Internal partners within a multi-site corporation;
- External partners within the sector;
- Multi-sectoral partners;
- Partners within and outside the LHIN region;
- Partners between associations representing different sectors, employers or health professionals; or
- Others as proposed by the applicant.

Private sector partners or health care associations are eligible to apply in partnerships with a MOHLTC-funded health care provider acting as the lead applicant.

Each partner’s proposed roles and responsibilities must be articulated in the application (please see “Application to become a Demonstrate Site Project for Nursing HR Planning”).

2. Design/Develop and Implement Tool(s) to Build Employer Capacity for Specific HHR Building Blocks.

The MOHLTC has outlined eight HHR Building Blocks for consideration. Applicants will select one or more building blocks for further development that represent the greatest need, or are of greatest interest to the demonstration site.

Successful applicants may consider the following:

- Implementing an existing tool, program, framework, or strategy to improve the demonstration site’s capacity for effective HHR planning;
- Developing a new tool, program, framework, or strategy;
- Enhancing an existing tool, program, framework, or strategy to create a new resource;
- Transferring existing knowledge to other organizations by acting as a “coach” or “mentor”; or,
- Other approaches as appropriate.

Sample tools may include:

- New processes or guidelines;
- Toolkits;
- Expert workshops;
- Coaching teams; or
• Other tools as appropriate.

Please note that funds allocated will match the scope of the proposed demonstration project.

3. Executive, Nursing, Union and Partnership Commitment – Signed Letters of Support

As part of the application, applicants are required to include signed letters of support from the following:

a. Executive sponsor or senior administrator acknowledging the lead organization’s participation, identifying the primary contact person and the individual responsible for project oversight (mandatory);

b. Nursing representation from one of the following (mandatory):
   i. Chief Nursing Officer, Vice-President of Patient Care or an equivalent individual that is responsible for nursing care in the organization; or
   ii. Individual or group of individuals that represent nurses and/or nursing leadership within the organization.

c. Vice-President of Human Resources or an equivalent individual(s) who has executive oversight and responsibility for health human resources and/or equivalent human resources executive(s) from partner organizations involved with the demonstration site (mandatory).

A letter of support from the local union is not mandatory but preferred (if applicable). Please note that application packages that contain letters of support from all 4 categories are preferred (if applicable).

4. Letter of Endorsement from Local Health Integration Network

A system approach is required to meet challenges in health human resources to ensure that health services continue to meet demands and to prevent the emergence of sector and geographic inequities in distribution. As part of the application, applicants are required to submit a letter of endorsement for the proposed demonstration site project from their Local Health Integration Network.

5. Participate In Evaluation, Knowledge Transfer and Dissemination

Materials produced as part of the demonstration sites will be shared across the proposed partnership but also with the MOHLTC. It is the MOHLTC’s intent to broadly share all materials, tools, guidelines, evaluations, and approaches across sectors and professions, as appropriate.

To support the evaluation process, applicants are required to:

a. Support staff participation in interviews, focus groups, surveys and other data collection for evaluation purposes;

b. Provide baseline data and data on an intermittent basis (at the request of the MOHLTC) on human resources;

c. Provide detailed reports as requested for monitoring and evaluation purposes; and
d. Develop, execute and report on formal pilot testing of HHR tools and practices.

Each application also requires a plan for knowledge transfer and dissemination.

6. Provide a Completed Application Package

All applicants must complete and submit the application package in its entirety. Late or incomplete applications will not be accepted.

Role of the Ministry of Health and Long-Term Care

The MOHLTC will provide demonstration sites with the following support:

- Funds to support approximately 12 demonstration sites with a total funding envelope of $3 million;
- Overall oversight of demonstration sites;
- Project management oversight to ensure timelines and deliverables are met within the resources allocated;
- Act as a central point of contact for issue resolution;
- Act as a facilitator of knowledge transfer and dissemination among demonstration sites and with the MOHLTC;
- Provide expert consultation and approval for all pilot testing of the HHR tools and practices;
- Lead the evaluation of demonstration site deliverables, process, and outcomes; and
- Monitor progress of the initiative.

Application Process & Key Dates

Application Process

1. Submit the Notice of Intention to Respond Form

Interested applicants are required to complete Schedule A – Notice of Intention to Respond form by October 19, 2007.

Completed forms should be submitted to the Nursing Secretariat by e-mail at nursingsecretariat.moh@ontario.ca or by fax at 416-327-1878.

Please note that completion of the full application is not required as part of the intention to respond.
2. Questions

Applicants with questions regarding this Call for Applications are encouraged to submit questions to Marsha Pinto, Senior Policy Analyst, Nursing Secretariat (marsha.pinto@ontario.ca) before October 24.

Please first review the Frequently Asked Questions included in this document (page 13). Additional questions received by the MOHLTC will be consolidated and answers will be distributed to all applicants via e-mail. Up to five questions will be accepted from each applicant.

Please note that the Ministry reserves the right to seek additional information from applicants about their proposals.

Further details will be provided to applicants at a later date regarding the scheduling of a teleconference to address any additional concerns.

3. Submit a Completed Application

Applicants are required to complete all sections of Schedule B – Application for HHR Planning Demonstration Sites. Please follow all instructions for this Schedule.

Completed applications are due by November 9, 2007.

Completed forms should be submitted to the Nursing Secretariat by e-mail at nursingsecretariat.moh@ontario.ca or by fax at 416-327-1878.

Key Dates

<table>
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<tr>
<th>Key Milestone</th>
<th>Date</th>
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<tbody>
<tr>
<td>Release of Call for Applications</td>
<td>Oct 9</td>
</tr>
<tr>
<td>Submission of completed Schedule A: Notice of Intention to Respond form</td>
<td>Oct 19</td>
</tr>
<tr>
<td>Last date for applicants to submit questions regarding the Call for Applications (questions will be distributed to all applicants)</td>
<td>Oct 24</td>
</tr>
<tr>
<td>Teleconference for interested applicants (further details will also be found on the Nursing Secretariat website) <a href="http://nursingsecretariat.on.ca">http://nursingsecretariat.on.ca</a></td>
<td>To Be Determined</td>
</tr>
<tr>
<td>Closing date of Call for Applications</td>
<td>Nov 9</td>
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<tr>
<td>Evaluation of responses</td>
<td>Nov</td>
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<tr>
<td>Notification of successful demonstration sites and scheduling of kick-off for demonstration site projects</td>
<td>Early Dec</td>
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Progress Reports

Progress reports which include unaudited financial statements of project expenditures must be submitted to nursingsecretariat.moh@ontario.ca by 5 p.m. on the following dates:

- January 31, 2008
- March 31, 2008

A **final report** including an audited financial statement must be submitted within three months after the end of the proposed demonstration project. Demonstration project end dates will be reviewed on a case by case basis.
General Terms and Conditions

- This Call for Applications is being issued so that the MOHLTC can gain the information necessary to fully understand the approach and capabilities of potential demonstration sites. The MOHLTC reserves the right to determine all qualitative and quantitative aspects relative to the evaluation criteria.

- By inviting a proposal, the MOHLTC makes no commitment or obligation to the applicants in any way, specifically no obligation to enter into any contract as a result of this Call for Applications.

- Late or incomplete applications will not be reviewed.

- The MOHLTC shall in no event be responsible for any costs incurred in the preparation and submission of a proposal in response to this Call for Applications.

- All deliverables, services and intellectual property rights derived under this Call for Applications including, but not limited to processes recommendations, toolkits, computer software, information technology, and computer databases shall have full access by the MOHLTC subject to institutional policies.

- Requests to present data or publish or present papers derived from work under this Call for Applications in professional journals or in any other types of publications or at professional conferences must be made to the MOHLTC and prior approval must be obtained in writing from the MOHLTC.

- Applicants must disclose if the proposed demonstration site already receives funding for HHR planning purposes from the MOHLTC or other funding agencies. Existing funded projects will not necessarily preclude organizations from participating in this initiative.

- The MOHLTC shall have the right to cancel this Call for Applications, at any time, either prior to, or after the closing date of the Call for Applications without award. Thereafter the MOHLTC may issue a new Call for Applications or do nothing. The MOHLTC shall not be obligated to provide reasons for the cancellation.

- Organizations are expected to be knowledgeable about relevant privacy legislation and must ensure that demonstration sites meet the Personal Health Information Privacy Act (PHIPA) legislation accordingly.

- Funding approval for successful applicants is subject to their entering into an agreement with the Ministry. The funding agreement will outline all of the terms and conditions associated with the grant funds, including accountability provisions.

- Funded demonstration sites will be required to participate in future workshops to help inform the MOHLTC of the impact of the demonstration sites on HHR planning.

- Successful applicants will be required to fulfill reporting requirements to the MOHLTC.
Key Contact Information

For further information regarding this Call for Applications, please contact:

Marsha Pinto
Senior Policy Analyst
Nursing Secretariat, MOHLTC
Phone: 416-326-5178
Email: marsha.pinto@ontario.ca

Frequently Asked Questions (FAQ)

Q. What is the maximum amount of funding that can be requested?
There is $3M of funding available for approximately 12 demonstration site projects. Please note that the ministry retains the right to fund demonstration sites for less than the requested amount.

Q. How long will this initiative last?
The expected length of the demonstration site projects will be one year.

Q. How will the upcoming provincial election impact on the roll-out of these demonstration site projects?
Since funds have already been allocated to this initiative, the upcoming election will not negatively impact the funding of the demonstration site projects.

Q. How extensive is the evaluation?
The details of the evaluation framework are currently under development. However, there will likely be both qualitative and quantitative data collection at baseline, periodically during the project, as well as following project completion. There may also be some limited data collection for long-term follow up. These will be discussed in detail with the selected demonstration sites.

Q. We have limited expertise in planning and conducting pilot testing of HHR tools and practices. What type of support will the Ministry provide?
Applicants will be asked to describe their limitations in these areas. The Ministry is expecting that some demonstration sites may require additional evaluation supports and will negotiate these requirements with selected demonstration sites.

Q. What if the changes we propose to make at our site contradict existing collective agreements?
Any changes proposed must adhere to and honour existing collective agreements.

Q. How do we account for multiple unions in our partnership?
Sign-off from all unions representing nurses is preferred for applicants with multiple unions. For further clarification on this issue, please contact the Nursing Secretariat.
Q. Does the Ministry support cross-sectoral partnerships?
The MOHLTC supports and encourages cross-sectoral partnerships, but will consider how effective the partnership can be in achieving the site’s proposed outcomes.

Q. Do partnerships need to be in place prior to the application being submitted?
No, but the intent to partner and letters of support are required. The formalization of a partnership can occur after the application has been submitted.

Q. What if one partner decides after submission that they do not want to commit to the initiative?
If a partner decides to leave the demonstration project, the lead organization will be required to demonstrate they have made best efforts to secure a new partner for the project.

Q. Why do I need letters of support from Executive, Nursing leadership, the Union(s), other partners and HR?
It is our experience that letters of support from all stakeholders will ensure that communication has taken place which is important for the success of the project. While we have indicated that not all letters are mandatory, we strongly encourage applicants to submit letters of support from all stakeholders.
# Applicant Checklist

Please verify you have completed the following steps as part of your response.

<table>
<thead>
<tr>
<th>Checklist</th>
<th>Completed? Y/N?</th>
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<tbody>
<tr>
<td>I have received all attachments:</td>
<td></td>
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<tr>
<td>• Call for Application</td>
<td></td>
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<tr>
<td>• Guide for Demonstration Site Projects for Nursing Human Resources Planning</td>
<td></td>
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<tr>
<td>• Schedule A: Notice of Intention to Respond</td>
<td></td>
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<tr>
<td>• Schedule B: Application to Become a Demonstration Site Project for Nursing HR Planning</td>
<td></td>
</tr>
<tr>
<td>I have read the Call for Applications for Demonstration Site Projects for Nursing Human Resources Planning document</td>
<td></td>
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<tr>
<td>I have read all of the supplemental material including the Guide for Demonstration Site Projects for Nursing HR Planning and Schedules A and B.</td>
<td></td>
</tr>
<tr>
<td>I have understood what is required and read the eligibility requirements</td>
<td></td>
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<tr>
<td>If I have questions, I have submitted a maximum of 5 questions</td>
<td></td>
</tr>
<tr>
<td>I have submitted Schedule A: Notice of Intention to Respond form</td>
<td></td>
</tr>
<tr>
<td>I have submitted a completed application (Schedule B) including signed letters of support</td>
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</tbody>
</table>
Guide for Demonstration Site Projects for Nursing Human Resources Planning

October 9, 2007

Ministry of Health and Long-Term Care
Nursing Secretariat
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Purpose of this Document

This document is designed to assist applicants in preparing a complete application to become a demonstration site for nursing human resources planning.

Please note that this document is one of four documents included as part of this Call for Applications. The other documents are:

1. Call for Applications for Demonstration Site Projects in Nursing Human Resources (HR) Planning
2. Schedule A: Notice of Intention to Respond
3. Schedule B: Application to become a Demonstration Site Project for Nursing HR Planning

Demonstration Site Projects Conceptual Framework: A Guide

HHR planning and practices play a key role in Ontario’s ability to successfully recruit and retain health care professionals in the province. To this end, the MOHLTC will be funding demonstration site projects that will increase employer capacity for nursing human resources planning and support the creation of more full-time nursing positions. To better understand the MOHLTC’s approach to the demonstration site projects, the following sections will provide a guide to:

- Partnership models;
- Workforce planning building blocks; and
- Evaluation approach

The Demonstration Site Projects Conceptual Framework is an overview of the MOHLTC’s approach for the demonstration site projects. The figure below outlines the key elements of the framework. The workforce planning building blocks are based on a review of the literature.
1. Partnerships

The objectives of creating partnerships for the demonstration sites are to:

- Create a forum for knowledge sharing between organizations at different stages in their workforce planning evolution.
- Promote new ways of developing, implementing and disseminating knowledge between organizations, sectors, and regions.
- Provide guidance, infrastructure, and resources for regional and provincial deployment of knowledge in workforce planning.
- Institutionalize, codify, and integrate knowledge into an organization’s culture, behaviour and existing business processes.

Suggested partnership options:

The MOHLTC recognizes that there are different partnership options to support implementation. The type of partnership will be dependent on the organization, region, sector, and tool to be implemented. The MOHLTC is looking for a mixture of different partnership models as part of the initiative that is representative of the mix of healthcare providers across Ontario.

Private sector partners or health care associations are eligible to apply in partnerships with a MOHLTC-funded health care provider acting as the lead applicant.

Applicants may consider one or more of the following partnership options:

- Internal partners within a multi-site corporation;
- External partners within the sector;
- Multi-sectoral partners;
• Partners within and outside the LHIN region;
• Partners between associations representing different sectors, employers or health professionals; or
• Others as proposed by the applicant.

Partnership considerations:

• All applications must include at least one new or existing partnership; at least one of the partners must be an employer of nurses.
• Partners in all sectors must have the capacity to fulfill their obligations as described in the application;
• Harmonious labour relations are important for successful implementation of HHR strategies; applicants should solicit support from union stakeholders, as appropriate, prior the application process; and
• LHINs may be engaged at an early stage as potential partners/facilitators of partnerships.

Applicants will include partnerships in their application.

2. Building Blocks

The MOHLTC recognizes that many organizations across the province have developed components of an HHR plan. In some cases, organizations have developed comprehensive HHR plans that have been implemented with great success. However, many employers have noted a large discrepancy between and within sectors with respect to the level of sophistication in HHR planning.

Through the demonstration site projects, it is the MOHLTC’s hope to:

• Foster grassroots development of tools through collaboration with experienced partners/groups;
• Create sector-specific knowledge that can be shared throughout the sector and also general knowledge that is relevant across all sectors and can be adapted to support interprofessional collaboration; and,
• Support demonstration sites across diverse regions, organizations, and sectors.

In order to support health care organizations across all sectors in improving HHR planning, a literature review was conducted to identify workforce building blocks that are foundational to creating a comprehensive HHR plan. The building blocks are as follows:
<table>
<thead>
<tr>
<th>Building Block</th>
<th>Description</th>
<th>Illustrative Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Retention</td>
<td>A systematic effort by employers to create and foster an environment that encourages current and future employees to remain within the organization and reduce or maintain a relatively low turnover rate compared to a target and or the industry average.</td>
<td>Innovative staffing models for retention, job shares, position shares (where two facilities share 1 FTE), workplace supports, cross-professional learning, and Healthy Work Environments (HWEs).</td>
</tr>
<tr>
<td>2. Nursing Managers’ HR interventions</td>
<td>Maximizing the return on investment of models/tools/frameworks or best practices as it relates to the organization's human capital while minimizing financial risk. It is the responsibility of managers to conduct these activities in an effective, legal, fair, and consistent manner.</td>
<td>Scheduling, combining Part Time (PT) lines, conversion of PT, Sick Time, and Over Time, and addressing overstaffing. Capitalization and efficiency.</td>
</tr>
<tr>
<td>3. Professional Practices/ Interprofessional Collaboration</td>
<td>Defined as the provision of comprehensive health services to patients by multiple health care professionals who work collaboratively to deliver the best quality of care in every health care setting. Interprofessional care encompasses partnership, collaboration and a multi-disciplinary approach to enhancing care outcomes.</td>
<td>Professional development (at any level), mentorship/preceptorship, orientation, and career path planning.</td>
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</tbody>
</table>
Key Considerations:

- Each building block has many sub-components that may not be articulated in the table above.
- Each building block is not mutually exclusive from other building blocks – many are interdependent and build on each other.
- Some organizations may have depth in one or more building blocks while others may have limited depth in the same building blocks.
- It is the MOHLTC’s intent to a) cover as many building blocks as possible across the demonstration projects and b) have a cross-section of organizations at varying levels of their nursing HR planning evolution.

Applicants will complete a self-assessment on their level of development for each building block. They will also identify one or more blocks to develop further through their proposed demonstration site project.

3. Tools to Build Capability

Applicants will propose the implementation of an existing tool or the creation of a new tool to help develop specific building block(s). Tools that are developed as part of this initiative will benefit demonstration sites, but they will also be a valuable asset that can be shared with organizations across the province to support full-time hiring and effective workforce planning, and to increase employers’ capacity to understand, plan for, and hire additional nurses.

Suggested tools may include one or more of the following:

- Processes / Guidelines;
- Toolkits;
- Expert workshops;
- Coaching Teams; or
- Other tools as appropriate.

Applicants are free to choose the tool most suited to the building block and resources allocated, but should ensure that knowledge transfer and resource sharing are central components of the implementation strategy.

The tables below identify a range of tools and resources that have already been developed that could be used to support the demonstration site project.
### Planning Tool Resources

<table>
<thead>
<tr>
<th>Planning Tool Resources</th>
<th>Service Delivery Model Sources</th>
<th>Professional Practice Models</th>
<th>Retention Models</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canadian Nurses Association (2005) – Evaluation Framework</td>
<td>AACN Synergy Model for Patient Care (American Association for Critical Care Nurses)</td>
<td>Liability Risks in Interdisciplinary Care: Thinking Outside the Box (The Conference Board of Canada)</td>
<td>80-20/HBPCC Model (UHN)</td>
</tr>
<tr>
<td>The Atlantic Health Human Resources Planning Study</td>
<td>(Non)traditional Models of Care Delivery (JONA)</td>
<td>Interprofessional Care Project (MOHLTC)</td>
<td>RNAO Home Healthcare (HHC) Orientation Toolkit</td>
</tr>
<tr>
<td>Toward a Pan-Canadian planning framework for health human resources: A green paper</td>
<td>A Toolkit to Facilitate the Implementation of Clinical Practice Guidelines in Healthcare Settings (Healthcare Quarterly)</td>
<td>Facilitating the Integration of Interprofessional Education into Quality Health Care: Strategic Roles of Academic Institutions (UBC)</td>
<td>RNAO Long-Term Care Orientation</td>
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### Succession Planning Resources

<table>
<thead>
<tr>
<th>Succession Planning Resources</th>
<th>Recruitment Resources</th>
<th>Nursing Managers’ HR Resources</th>
<th>Labour Relations Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Practice Guidelines – Developing and Sustaining Nursing Leadership (RNAO)</td>
<td>Rotational Programs in Medical-Surgical Units (JONA)</td>
<td>Shift Rotation Manual Developed in British Columbia (British Columbia Nurses Union)</td>
<td>Health Care Jurisdictional Labour Relations Database</td>
</tr>
<tr>
<td>Harvard ManageMentor Plus6</td>
<td>Clinical Nurse Scholar Program (Nursing Economic$)</td>
<td>Licensed Practical Nurses Toolkit: A Toolkit for Continuing Care Leaders (Alberta)</td>
<td>HHR Toolkit (MOHLTC)</td>
</tr>
<tr>
<td>A new look at succession management (Ivey)</td>
<td>Magnet Hospital Prevention Model</td>
<td>Australian Tool on Resource Allocation for Nursing Hours</td>
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</tbody>
</table>

**Applicants will propose to create and implement new tools or implement existing tools that enhance specific building block(s).**

### 4. Evaluation

**How will the demonstration sites be evaluated?**

There are two major components to the evaluation:

a) Overall evaluation  
b) Pilot testing of the demonstration site projects specific HR planning tools and practices.
The overall evaluation of the demonstration sites will be led by the Ministry and will address the following evaluation questions:

- Did the demonstration projects result in the intended outcomes?
- What innovative processes and HR planning tools and practices were used by the demonstration sites?
- What was learned about the development, implementation and testing of the HR planning tools and practices?
- To what extent were the deliverables outlined for the demonstrate site projects achieved?

Demonstration sites are required to provide support to staff for interviews, focus groups and survey administration and to respond to requests for human resources data from the MOHLTC, as appropriate. Sites will also submit periodic reports.

The pilot testing of demonstration site specific HR planning tools and practices will be led by each demonstration site team. This should address the following evaluation questions:

- How effective are the tools and practices that have been developed?
- How feasible is implementation of these tools and practices for other organizations?
- What is the level of acceptance from end users?
- What is the potential for sustainability of the approaches that the sites have taken?
- What types of resources were needed to implement the HR planning practices?
- What were the costs and benefits of implementing the project?

Applicants are encouraged to propose their own pilot testing evaluation framework with a focus on “active evaluation” where evaluation activities may occur in parallel with implementation.

Summary of Key Points for Applicants

- Applicants will provide a self-assessment on their level of development for each building block. They will also identify one or more blocks they wish to develop further through their proposed demonstration site project.
- Applicants will propose to create and implement new tools or implement existing tools that enhance specific building block(s).
- Applicants will include partnerships in their application.
- Applicants are encouraged to propose their own pilot testing evaluation framework with a focus on “active evaluation” where evaluation activities may occur in parallel with implementation.
Schedule A – Notice of Intention to Respond

Instructions: Bidders are requested to complete and return this form by email or facsimile to:

Marsha Pinto  
Ministry of Health and Long-Term Care, Nursing Secretariat  
Email: nursingsecretariat.moh@ontario.ca  
Fax: 416-327-1878

Deadline: October 19, 2007

<table>
<thead>
<tr>
<th>Lead respondent</th>
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<tbody>
<tr>
<td>Mailing address</td>
<td></td>
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<tr>
<td>Name and title of key contact</td>
<td></td>
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<tr>
<td>Email</td>
<td></td>
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<tr>
<td>Phone</td>
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</tr>
<tr>
<td>Local Health Integration Network</td>
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Please indicate your election by putting an X in the box:

The Bidder will respond to the Call for Applications for Demonstration Site Projects in Nursing HR Planning: ☐

Authorized Representative’s Signature  
Date
Schedule B – Application to become a Demonstration Site Project for Nursing HR Planning

October 9, 2007

Ministry of Health and Long-Term Care
Nursing Secretariat
56 Wellesley St. W, 12th Floor
Toronto, ON
M5S 2S3

Email: nursingsecretariat.moh@ontario.ca

Fax: 416-327-1878
Instructions

- Please complete the application using MS Word in the spaces indicated.
- There is a maximum amount of space to respond to questions. However, should you feel that you require additional space please include attachments.
- Each partner organization does not need to complete this application form.
- High level project plans and timelines are sufficient for this application. Further detail will be provided to successful applicants regarding project plans.
- Completed application forms should be sent to the Nursing Secretariat by email at nursingsecretariat.moh@ontario.ca or by fax at 416-327-1878.
### Part One :: Lead Organization Profile

<table>
<thead>
<tr>
<th>Name of Lead Organization</th>
<th>Mailing Address</th>
<th>Main Phone</th>
<th>Main Fax</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>E-mail Address</td>
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<table>
<thead>
<tr>
<th>Name of CEO or Executive Director</th>
<th>Local Health Integration Network</th>
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</tbody>
</table>

Please select one sector that best describes your organization:

- [ ] Primary care
- [ ] Acute care
- [ ] Tertiary/quaternary care
- [ ] Community care
- [ ] Public health
- [ ] Long-term care (private funding [ ] or public funding [ ])
- [ ] Mental health & addiction
- [ ] Other (please specify)

<table>
<thead>
<tr>
<th>Preferred language of correspondence</th>
<th>E-mail address</th>
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**Part One (continued)**
Part Two :: Organizational Self-

Using the space provided, please provide a brief description of your organization and the services it provides.

Please identify your organization’s environment and current nursing workforce.

- [ ] Urban
- [ ] Rural/Remote
- [ ] Small (less than 100 nurses)
- [ ] Medium (more than 100 but less than 500 nurses)
- [ ] Large (more than 500 nurses)

<table>
<thead>
<tr>
<th>Total number of RN FTEs</th>
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<tr>
<td>Total number of RPN FTEs</td>
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Assessment

<table>
<thead>
<tr>
<th>% of total RNs that are Full-Time</th>
<th>Total number of RN vacancies</th>
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</thead>
<tbody>
<tr>
<td>% of total RNs that are Part-Time</td>
<td>Total number of RPN vacancies</td>
</tr>
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</table>

Purpose: The purpose of the organizational self-assessment is to determine a) your organization’s readiness to become a demonstration site and b) the organizational needs that you wish to develop as part of this initiative. Demonstration sites are not necessarily expected to be experts in HHR planning, but it is expected that applicants will have a range of capabilities.
Using the space provided, please briefly describe why your organization is applying to become a demonstration site.
Part Two (continued)

Please score your organization's capabilities within the following 8 workforce building blocks using a scale from 0 to 5:

- 0 – We have no capability in this area
- 1 – We have minimal capability in this area
- 2 – We have some capability in this area
- 3 – We have moderate capability in this area
- 4 – We have excellent capability in this area
- 5 – We are experts in our sector or region in this area

<table>
<thead>
<tr>
<th>Building Block 1 – Retention</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>My organization uses retention strategies such as innovative staffing models for job shares and/or position shares, workplace supports, cross-professional learning, and initiatives to support Healthy Work Environments (HWEs).</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Block 2 – Nurse Managers’ HR Interventions</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>My organization uses different interventions such as combining part-time (PT) lines, conversion of PT, Sick Time, Over Time, and take steps to address overstaffing.</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Block 3 – Professional Practices / Interprofessional Collaboration (IPC)</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>My organization supports and is active in developing nursing professionals and is active in interprofessional collaboration through initiatives such as: mentorship/preceptorship, orientation, and career path planning (among others).</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Block 4 – Labour Relations and Negotiations</th>
<th>Score</th>
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</thead>
<tbody>
<tr>
<td>My organization works with our local union in identifying and/or addressing issues, and interpreting local collective bargaining agreements.</td>
<td>0</td>
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</table>

<table>
<thead>
<tr>
<th>Building Block 5 – Planning Tools</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>My organization regularly uses planning tools such as: FTE indicators, utilization reviews, workload measurements, and forecasting models.</td>
<td>0</td>
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</table>

<table>
<thead>
<tr>
<th>Building Block 6 – Succession Planning</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>My organization uses strategies such as role-based plans, individual-based plans, and pool-based plans to address succession planning.</td>
<td>0</td>
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</table>

<table>
<thead>
<tr>
<th>Building Block 7 – Recruitment</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>My organization uses recruitment strategies such as HealthForceOntario, clinical placements, and marketing recruitment campaigns to attract nurses to our organization.</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Block 8 – Service Delivery Models</th>
<th>Score</th>
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</thead>
<tbody>
<tr>
<td>My organization has articulated a service delivery model that includes supervision requirements, patient-to-nurse ratios, staffing mix, forecasting future trends in health care, and measuring the impact of new technologies.</td>
<td>0</td>
</tr>
</tbody>
</table>
Part Two (continued)

Based on your self assessed scores for each building block, please identify one or more building blocks which your organization is interested in developing, implementing or sharing as a demonstration site project:

- Building Block 1 – Retention
- Building Block 2 – Nurse Managers’ HR Interventions
- Building Block 3 – Professional Practices / Interprofessional Collaboration (IPC)
- Building Block 4 – Labour Relations and Negotiations
- Building Block 5 – Planning Tools
- Building Block 6 – Succession Planning
- Building Block 7 – Recruitment
- Building Block 8 – Service Delivery Models

In the space below, please provide further details as to why you have chosen specific building block(s) and how your organization will benefit from this initiative.
In what capacity does your organization wish to participate as part of the demonstration site project?

- Develop and implement a tool(s) for specific building block(s) in your own organization and/or across partner organizations
- Evaluate an existing tool(s)
- Share a tool(s) with partner organizations

How will developing your proposed building block(s) support other partners in effective HHR planning?
Part Three :: Partner Organizations

Please list each proposed partner organization and identify whether the organization is a primary partner, secondary partner or equal partner.

Using the space below, please briefly describe the role planned for your organization and each partner in the demonstration site project.
Part Three :: Partner Organizations (continued)

For each partner listed above, please complete the organizational profile below. Please also ensure that a letter of support from that partner is included with your application. Attach pages in the format below if you require additional space.

Name of partner organization (1)

Please identify the type of organization this partner represents
☐ Local Health Integration Network (LHIN) office
☐ Internal unit within a multi-site corporation
☐ Organization within the same sector
☐ Organization from a different sector
☐ Organization within the same LHIN region
☐ Organization from a different LHIN region
☐ Other (please specify)

Is this a new or existing partnership?
☐ New     ☐ Existing

Using the space below, please briefly describe the role this partner will play in the demonstration site project.
Part Three :: Partner Organizations (continued)

Name of partner organization (2)

Please identify the type of organization this partner represents
- Local Health Integration Network (LHIN) office
- Internal unit within a multi-site corporation
- Organization within the same sector
- Organization from a different sector – if so which one?
- Organization within the same LHIN region
- Organization from a different LHIN region – if so which one?
- Other (please specify)

Is this a new or existing partnership?
- New
- Existing

Using the space below, please briefly describe the role this partner will play in the demonstration site project.
Part Three :: Partner Organizations (continued)

<table>
<thead>
<tr>
<th>Name of partner organization (3)</th>
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<tbody>
<tr>
<td><strong>Please identify the type of organization this partner represents</strong></td>
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<tr>
<td>□ Local Health Integration Network (LHIN) office</td>
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<td>□ Internal unit within a multi-site corporation</td>
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<td>□ Organization within the same sector</td>
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<td>□ Organization from a different sector – if so which one?</td>
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<tr>
<td>□ Organization within the same LHIN region</td>
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<tr>
<td>□ Organization from a different LHIN region – if so which one?</td>
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<td>□ Other (please specify)</td>
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<table>
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<tr>
<th>Is this a new or existing partnership?</th>
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<tr>
<td>□ New</td>
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</table>

**Using the space below, please briefly describe the role this partner will play in the demonstration site project.**
Name of partner organization (4)

Please identify the type of organization this partner represents
☐ Local Health Integration Network (LHIN) office
☐ Internal unit within a multi-site corporation
☐ Organization within the same sector
☐ Organization from a different sector – if so which one?
☐ Organization within the same LHIN region
☐ Organization from a different LHIN region – if so which one?
☐ Other (please specify)

Is this a new or existing partnership?
☐ New ☐ Existing

Using the space below, please briefly describe the role this partner will play in the demonstration site project.
Part Four :: Approach

Purpose: This section is designed to better understand the tools you will use to address specific building blocks and the activities you will undertake to achieve the proposed demonstration site project objectives.

Describe at a high level your approach to the demonstration site project. What tools are you proposing to use and/or develop? How will you do this? What are your objectives, their associated indicators, and key deliverables?
Describe the factors that will ensure that your demonstration site project is successful.

How will you ensure sustainability in the absence of funding beyond this demonstration site project?
Please provide a written, high level timeline of activities and indicate key milestones. For example, “January 2008 – Begin development of succession plans; February 2008 – Roll-out 3 new HHR planning tools;” etc.)
Part Five :: Evaluation

Please describe how you propose to pilot test the HHR planning tools and practices that you have identified for this demonstration site project.

In your description, please comment on the following:

- Scope of the pilot test (number and identity of the organizations involved, specific departments);
- Methods to be employed;
- Focus of the overall evaluation (i.e. provide sample questions where possible);
- Resources that you will allocate to support pilot testing; and
- Any limitations to undertake pilot testing.
Part Five :: Evaluation (continued)
Part Six :: Knowledge Sharing

The knowledge and experience gained from your demonstration site project will contribute to the development of other initiatives.

A) Describe a dissemination and knowledge transfer plan for sharing your experiences and deliverables with other organizations.

B) Describe how you will apply the relevant knowledge and experience gained from your demonstration site project to support HHR planning that fosters interprofessional care in your organization. Specifically, discuss which other providers in your organization could benefit from this initiative.
Part Seven :: Budget

Please include a breakdown of expenses linking the expenditures with their associated activities.

Please note that additional details regarding expenses may be requested by the MOHLTC. The level of funding awarded will be dependent on available funding, the scope of the proposed project including the number of building blocks that will be addressed, and evaluation results of each application.

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Salaries and Benefits</td>
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<td>Consulting and Sub-contracting</td>
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<td>Travel and Accommodation</td>
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<td>Telephone/fax/mail/postage</td>
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<tr>
<td>Rentals / Utilities</td>
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<td>Evaluation</td>
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<td>Dissemination</td>
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<td>Supplies and Equipment</td>
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<td>Overhead Costs</td>
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<td>Other (please specify):</td>
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<td>Other (please specify):</td>
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<tr>
<td><strong>Total Expenses</strong></td>
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</table>
Part Eight :: Other Sources of Funding

If you have received (or applied for) project funding for the activities described in this application from other government sources, please complete the table below.

<table>
<thead>
<tr>
<th>Year</th>
<th>Source</th>
<th>Project Title</th>
<th>Amount Requested</th>
<th>Amount Awarded</th>
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Part Nine :: Additional Information

Please provide any additional information to support your application. Append additional pages if necessary.