



SPOT

Salary Progression Criteria for Occupational Therapists & Assistants

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INTRODUCTION

These progression criteria will be used in conjunction with the APEX and Northland District Health Board Occupational Therapists Collective Agreement (CA). Application of the salary scales for Therapists and Assistants is prescribed in the CA. This includes the mechanisms for progression from the top automatic salary step to the additional progression step and further merit progression through a pathway for career development for Therapists.

The salary progression process requires mutual responsibility and accountability of all staff involved. These criteria are intended to assist the manager, professional advisor and the employee to establish agreed expectations and associated evidence required for salary progression.

OCCUPATIONAL THERAPISTS

The CA provides movement through the salary scale:

- Progression from steps 1 - 5 by automatic annual progression (Refer to clause 5.3.1.1)
- Additional step progression from step 5 to step 6 upon achievement of objectives agreed by the Occupational Therapist and their manager, set prospectively when the employee reaches Step 5, being the top automatic salary step. (Refer to clause 5.3.1.2 and 5.1.4)
- Progression from step 6 and onwards is through the operation of the salary progression process detailed in the CA. The criteria outlined in this document are intended to assist the Occupational Therapist and their manager to agree a set of objectives, in consultation with the Professional Advisor, that upon achievement will enable progression to the next salary step (Refer to clause 5.3.1.3 and 5.1.5)

The Professional Advisor will be fully involved and, where appropriate, attend all performance reviews, including all meetings for setting and measuring progress towards agreed annual performance objectives of each Occupational Therapist.

MANAGEMENT OF EXPECTATIONS

To avoid any potential for misunderstanding it is important to take into account the management of expectations as outlined in clause 5.1.5.2 of the CA. There will be limits to the extent by which a Occupational Therapist may progress through the Advanced Clinician/Advanced Practitioner/Designated Positions salary scale using the merit process and criteria. This must be reflected in the application of the progression criteria. Progression will be dependent on the scope, responsibilities, service needs and opportunities available in NDHB or the service in which the employee works. While these limitations should become apparent during the discussion between the Occupational Therapist and their manager required for objective setting under the merit process, it is also important that any limitations be clearly identified when the progression criteria is being developed. This must align to and not replace the requirements of the CA.

PRINCIPLES

It is important to note the following principles:

1. The salary progression process will be a prospective process (subject to Process 3 below). A minimum of 12 months will be serviced on each salary step.
2. It will align with regulatory and professional standards as appropriate.
3. It requires achievement of a satisfactory performance review as agreed by the Occupational Therapist and his/her manager prior to the commencement of salary progression process.
4. It requires that an Occupational Therapist is not under a performance management process.
5. It establishes challenging expectations within the Occupational Therapist's current role, which could be via a clinical/practice and/or a managerial pathway.
6. Both the individual and their manager share accountability for initiating and maintaining the salary progression process.

PROCESS

1. The Occupational Therapist and their line manager will review the expected elements and develop SMART objectives in consultation with the Professional Advisor.
2. The objectives will be signed off by the appropriate manager(s).
3. Consultation between the Occupational Therapist and their line manager(s) should be ongoing throughout the year to allow for any amendments should circumstances change or additional opportunities present themselves.¹
4. The objectives and evidence of the completed activity will be reviewed at the end of the year by the line manager and the Professional Advisor.
5. If all agreed activities have been completed, then the salary progression occurs.
6. The date on which the portfolio is presented will become the employee's anniversary date for salary purposes.
7. The assessment of the portfolio will be undertaken by the Professional Advisor and a recommendation made to the line manager.
8. Where there are disagreements during this process, NDHB dispute resolution processes will apply.

¹ There may be circumstances where relevant achievements that have not been identified as objectives in the prospective process may be considered in determining whether step progression is appropriate. This may be considered on a case-by-case basis.

SUMMARY OF STEP MOVEMENTS – OCCUPATIONAL THERAPISTS

Step		Expected Outcomes
1 to 5	Auto	
5 to 6	Additional Progression	
6 to 7	Advanced Clinician	Table 1
7 to 8		Table 2
8 to 9	Advanced Clinician/ Designated position	Table 3
9 to 10		Table 4
10 onwards		Table 4 plus meet agreed annual performance objectives, aligned to organisational strategies

Step 5 to Step 6 - Additional Progression

Mutually agreed objectives for progressing from step 5 to step 6

- Should be in line with the registration body's Board continuing competency programme requirements (5 objectives, with one in each area of competency):
 - o Applying Occupational Therapy knowledge, skills and values.
 - o Practising appropriately for bi cultural Aotearoa New Zealand,
 - o Building partnerships and collaboration,
 - o Practising in a safe, legal, ethical and culturally competent way and
 - o Engaging with and being responsible for your profession.

- Should add value to the service the Occupational Therapist works within as agreed with the Service Manager and Professional Advisor

- Should reflect practice that would be expected of an experienced clinician

Examples of activities considered as meeting objectives include:

- Continuing Education:
 - o Literature reviews
 - o Presenting clinical management guidelines to other Occupational Therapists e.g. at journal club
 - o Conducting in-service presentations
 - o Mentoring newly qualified practitioners and assistance to enable safe transition into the workplace
 - o Involved in updating/ developing resource materials
 - o Special interest group activities

- Practice Review:
 - o Deliver peer review or performance review with suggestions at an advanced level to provide advice and guidance to less experienced practitioners
 - o Identifies inefficiencies or issues within their service and possible solutions to these
 - o Reviews effectiveness within own team and helps and enables others to work as a team
 - o Contributes to and participates in ideas/programmes/interventions that may lead to improvements in practice, service delivery or wider community health outcomes
 - o Assist with development of an audit tool

- Cultural Responsiveness:
 - o Demonstrate that you have integrated Maori concepts of health and wellbeing into practice.
 - o Shows an awareness of health inequalities and uses this to change and/or develop practice

Criteria to be met to progress from Step 6 to Step 7

Table 1

Expected Criteria
1. Co-ordinate clinical service in one or more areas of practice.
2. Takes an active role in resolving ethical, professional or service issues
3. Initiates service improvements through validated research findings in clinical practice / service delivery to improve service delivery in own area of practice
4. Provides advice to manager / and or Professional Advisor regarding own caseload and trends to aid effective service delivery.
5. Demonstrate developing advanced knowledge and skills in line with own professional development needs
6. Provides supervision for senior staff as required including performance development
7. Recognise and understand strategic direction of Maori concepts or ideas that improve Maori Health outcomes within service area.

Criteria to be met to progress from Step 7 to Step 8

Occupational Therapists at this level will have developed specific expertise and skills within their area of practice, while maintaining competencies in other areas as required. Alternatively, where the opportunity to specialise is not available, demonstrates a significantly greater level of competence and advanced skills relevant to that position over and above those expected at Step 7.

Meets all previous criteria and in addition meets the following:

Table 2

Expected Criteria
1. Completion of a previously agreed programme of continuing professional development relevant to specific area of work at post graduate level.
2. Identification of gaps in service and development of possible solutions to address quality issues, and demonstration of leadership in the implementation of an agreed solution, in conjunction with other stakeholders
3. Co - ordination of audits, reporting results and communication of recommendations
4. Demonstrates advanced levels of knowledge and skills in own clinical areas and disseminates through DHB
5. Participates in annual work area planning process relative to own work area in partnership with manager and Professional Advisor
6. Provides coaching, mentoring and supervision to qualified staff to aid development of other staff.

ADVANCED CLINICIAN/DESIGNATED POSITION

Criteria to be met to progress from Step 8 to Step 9

Meets all previous criteria and in addition meets the following:

Table 3

Expected Criteria
1. Demonstrates a constructive approach to conflict resolution
2. Successfully complete specific projects as agreed with manager, in consultation with Professional Advisor that aligns to the organisation's requirements
3. Evidence of networking with peers and professional colleagues within the DHB and external e.g. other DHBs, academic institutions and special interest groups
4. Demonstrate development of leadership skills through leading projects/initiative, building relationships and establishing rapport with other OT colleagues

ADVANCED CLINICIAN/DESIGNATED POSITION

Criteria to be met to progress from Step 9 to Step10

Meets all the previous elements and in addition meets the following:

Table 4

Expected Criteria
1. Demonstrates awareness, critical analysis, summary and dissemination of current literature and application of findings to current practice.
2. Identification of gaps in the service and co-ordination of steps to remedy them, which may include service reviews, practice audits and change of practice
3. Demonstrate ongoing professional development in advanced clinical or leadership skills
4. Demonstrate networking with peers and professional colleagues within NDHB and external institutions / agencies
5. Development of practice standards / best practice guidelines for use across NDHB and communication of these
6. Undertaking of projects, research, audit or service review relevant to NDHB or regionally / nationally. Regional or national initiatives need to be relevant to NDHB
7. Consultation with other services and clinicians to enhance effective processes and collaborative working
8. Provision of supervision, coaching, mentoring and development of other staff as required including performance planning and review processes
9. Co –ordination of a service in one or more areas of practice
10. Evidence of resolving ethical, professional or service issues
11. Provision of advice to management regarding service provision and delivery
12. Evidence of utilisation as an expert resource in area of practice over and above that expected of a general Occupational Therapist.

Progression to Steps 11 through 15 will be achieved by meeting agreed annual performance objectives, aligned with organisational and service plans, that demonstrate leadership and management skills.

OCCUPATIONAL THERAPY ASSISTANTS

Criteria yet to be developed