

# Introduction to Train the Trainer

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## Assuring quality in home and community-based services

**Purpose:** The purpose of the Train the Trainer package is to prepare case management agencies and others to present the CMS training “Case Managers: Home and Community-Based Services (HCBS) Waiver Assurances to Improve Quality” on site rather than on-line. This option is being offered with the understanding that not all case managers or case management agencies may have easy access to the Internet.

### What you will need:

#### Supplies

- Name tags
- Flip charts
- Markers
- Masking tape
- Sticky pads (1 for each table)

#### Materials (from Train the Trainer links)

- Trainer’s Manual
- Power point slides
- Unit 4 Case Study episodes (paper)
- Unit 4 Exercises and Process Questions (included with case studies)
- Participant handouts (Agenda, Graphic, Evaluation)

#### Technology (optional; entire training can be done via handouts)

- Computer and LCD
- Screen
- Speakers

**Overview of Training:** The course is designed to help case managers make the connection between the federal HCBS Assurances and the case manager’s role in promoting and documenting quality. The course is divided into four Units.

1. Introduction and Learning Objectives: describes the purpose of the training and what case managers will learn by participating.
2. Waiver Basics: a quick overview of the waiver program and an introduction to the six Assurances.

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3. HCBS Roles in Quality: the role of CMS, the state Medicaid agency and the case manager in the quality assurance and improvement cycle.
4. Waivers in Action: this is the heart of the training. During this Unit learners follow a case study through each of the six Assurances. After each episode of the case learners work in groups to answer questions and discuss the implications of the Assurances on the case. Workers are encouraged to compare the case to their own experiences.

**Timelines:** We anticipate that this is a half-day training. Although it is best not to adhere to a rigid agenda, use the following as a guide to pace your progress. Remember that the most important material is in Unit IV.

Unit	Approximate Time
I. Introduction	15 minutes
II. Waiver Basics	20 minutes
III. Roles in Quality	20 minutes
IV. Assurances in Action	170 minutes
V. Wrap Up/Evaluation	5 minutes

**Customizing the Training:** This training was developed as a generic product to be used on-line and in all states. At your site you have the opportunity to add state or agency specific information that will make the training more relevant. In particular, you should be prepared to lead discussions using the following local information:

- At least one performance measure from your state HCBS waiver application pertaining to each of the six waiver assurances.
- The following information for the waiver(s) trainees are working under:
  - Name of HCBS waiver
  - Target population of the waiver

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- Geographic area served by the waiver
  - Waiver capacity (number of people who can be served)
  - Name of your state Medicaid agency
  - Name of state agency that operates the waiver
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- The level of care criteria for HCBS eligibility in your state
  - The qualifications (certification, licensure requirements) required in your state for various types of HCBS workers
  - What critical events must be reported in your state, and
    - What is the process for reporting events of abuse, neglect and exploitation?
    - Who do you report to and when?
    - What is the timeline for reporting?
    - Who are mandatory reporters in your state?

**Case Studies:** The activities in Unit 4 are based on case studies. The case study approach provides opportunities for learners to apply what they learn to a life-like situation and to bring their own experiences into the classroom. This is a very important learning tool.

As a trainer you will choose one of two case studies to use with your group; select the case that most closely aligns with the work of your audience. The two studies are:

- Case #1: Mr. Richard Kaye, an older adult
- Case #2: Mr. Sam, Wilson, a 36 year old with intellectual disabilities

You will also choose which way you prefer to present the material.

- Video: If you have a computer and LCD available you may want to download the video files in the Train the Trainer link #4. Follow the cues in the trainer guide for when to play each video.
- Written Script: Whether not you show video clips of the case study, you will want to print the written case study at the Train the Trainer link #5. Follow the cues in the trainer guide for when to distribute each handout (episode).

Whether you are using the video or the paper version, you must make copies of the process questions included in Train the Trainer link #5. The questions should be distributed to the group after each episode as directed in the Trainer Manual.

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**Power Point Slides:** The Power Point slides highlight some of the important points that you will be discussing throughout the training. As you follow the Trainer's Manual you'll find instructions for when to display each slide. The slides are provided to enhance training retention among visual learners. Again, you have choices on how to use the slides:

- If you do not have the technology to project the slides, you can print the slides and include them in the participant handouts.
- If you do have the technology to project the slides, look in the left column of the Trainer's Manual for a guide to when display each slide.
- Even if you do have the technology to project the slides, you may want to print copies as well and include the copies in the participant handouts.

**Participant Handouts:** Participant handouts are divided into two groups. The first group is distributed as participants enter the room. The second group is distributed during the training and according to the cues in the Trainer's Manual. The handouts include:

- Group One: Agenda, graphic, Group Exercise #1, Power Point Slides (optional)
- Group Two: Case study episodes and process questions

**Understanding the Trainer's Manual:** The Trainer's Manual is divided into three columns. The left column indicates which Power Point slide should be displayed at any time as you move through the content. The middle column is the narrative or training content; this is what you will be saying as you move through each Unit. The right column contains trainer tips or directions for things such as leading group activities or exercises. It also directs when you will distribute each episode of the case study materials.

As you look at the middle section you will see some color coded text. Note the following:

**Text shaded this color** is a trainer instruction rather than content. It generally indicates the feedback or response you might offer after group questions or exercises.

**Text shaded this color** indicates the beginning of a group activity or exercise

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**Text shaded this color** is an important point that you may want to emphasize

**Group Activities:** Throughout the training you will see numerous group activities or exercises. If your group is 10 or larger it is a good idea to break the large group into smaller groups during some of the exercises. The Trainer's Manual indicates when small groups should be used. The general rule is:

- When the instruction says **ASK THE GROUP** this is a question to be asked of the large group.
- When the instruction says **ACTIVITY** or **EXERCISE**, this is better done in smaller groups. (Work done in small groups is then reported out to the large group).

**The Adult Learner:** If you're not familiar with conducting training it might be helpful to keep some tips in mind regarding how adults learn.

- First and foremost, **adults learn best through direct participation; they learn by doing.** This training is designed to be participatory; get everyone involved in the exercises and case studies. Welcome questions and group discussions.
- Remember that the training participants bring years of work and life experiences to the classroom. The best trainers are able to incorporate that wealth of knowledge into the training experience. When possible, allow participants to come up with their own answers before you as a trainer provide information. **Use the expertise and experience in the room.** Training participants often learn as much from each other as they do from the training content.
- Learning is directly proportional to the amount of fun you have. When people are enjoying the learning process, they will participate more and therefore get more out of the training session.
- **90/20/8 Rule:** Learners can listen for 90 minutes with attention, 20 minutes with retention. There should be no more than 8 minutes of lecture at any given time. Always allow time for group response and interaction.

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- It's very important to use a variety of methods when training. People learn in many ways. According to Edgar Dale's Cone of Learning, retention rates vary according to method of learning:
  - Lecture 5%
  - Reading 10%
  - Audio-visual 20%
  - Demonstration 30%
  - Discussion group 50%
  - By doing 75%
  - By teaching others 90%

**Managing the Classroom:** Remember: *Trust the group to solve its own problems. Given a chance they almost always will find a solution.* Here are a few hints for handling some common training situations:

### Questions you can't answer

- Refer them back to the group
- Refer them back to the person asking the question
- Refer them to their supervisor
- Use the "Parking List" if answer not readily available

### Questions you can answer

- Give the group a chance to discover the answer on their own first.
- If no one knows the answer, but you do, provide it.

### Everyone talking at once

- Ask for the group's attention.
- Be silent and wait for them to pay attention.
- Ask that only one person speak at a time.

### Side Conversations

- Tolerate them unless they disturb others.
- Move closer to the talkers.
- Ask them to share with the group.

### Arguments

- Refer the person's comments back to the group.

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- Maintain emotional control. Ask to park the issue.

**Remember:** Your role in this training is less that of a trainer and more of a facilitator. You are guiding the group through the material, but most of the learning will occur in the group activities and interaction.