

Preparation Checklist and Training Tips

Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs

This document is intended to complement the **Trainer Guide** for the *Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs*, developed by the National Long-Term Care Ombudsman Resource Center (NORC). Read the [Curriculum Overview](#) to understand the purpose of the training materials and how to use them first, then use this document to ensure you are fully prepared to present the curriculum as designed.

Reminders: Screening Opportunities of Potential Representatives

Certification training provides additional opportunities for screening and risk management as you get to know the trainees. For example, the ability of a trainee to separate their own experiences from the role of the Ombudsman program and/or their responses to case studies can provide important insight into their ability to become an effective representative of the Office. You may find that you need to provide additional coaching or decide not to move forward with additional training for some individuals. If you feel an individual is not a good fit for this unique position, it is best to discuss this privately with the individual early in the process before the trainee has access to residents. Refer to the *Volunteer Risk Management Considerations for Long-Term Care Ombudsman Programs* [worksheet](#) to help identify potential risks, review current program practices, and develop recommendations for improvements.

Thank you for taking the time to review this checklist prior to training. Your trainees will have a better learning experience and become more effective advocates due to your preparation.

The following applies to each of the ten (10) modules.

Preparing for Training

Written Materials (trainer guides, trainee manuals, PowerPoints)

- ✓ Before conducting training, read the **Trainer Guide** and **PowerPoint presentation** for each module.
- ✓ While you may not be able to cover every detail in every module during the training, the PowerPoint slides will provide you with an outline of critical training points and will help guide you through the material. Therefore, it is important to be familiar with the entire module so you can present a coherent overview of the material.
- ✓ Add state-specific information to the materials (see State-Specific Information below).

Online Training Materials

- ✓ Review each of the ten online training modules.
- ✓ Review the instructional materials for the online training.
- ✓ Decide in advance how you will incorporate the online training modules to enhance your classroom and independent study training opportunities. Give guidance to the trainees about when to view and complete a module.
- ✓ To help trainees feel comfortable with the online training, provide them with an introduction to the online course, and ensure they review the instructional materials. If necessary, demonstrate access to the training platform, how to bookmark the site as a favorite for easy retrieval, and how to navigate the modules and quizzes. Assure the trainees that the Office of the State Ombudsman will receive notification when they complete and pass modules.

Basic Adult Learning Principles¹

Here are some adult learning principles to keep in mind as you conduct this training:

- ✓ Adults learn better in an informal, non-threatening environment.
- ✓ Adults learn better when they want or need to learn something.
- ✓ Adults learn better when their individual learning needs and styles² are met:
 - Visually (pictures, images)
 - Auditory (sound, music)
 - Verbally (speech and writing)
 - Physically/kinesthetic (learn by doing, movement)
 - Logically (logic, reasoning)
 - Socially (group interaction)
 - Solitary (self-study)
- ✓ Adults learn better when their previous knowledge and experience are valued and used.
- ✓ Adults learn better when there are opportunities for them to have some control over the learning content and activities.
- ✓ Adults learn better through active mental and physical participation in learning activities.
- ✓ Adults learn better when they have opportunities to practice or apply successfully what they have learned.
- ✓ Adults learn better when sufficient time is provided for the assimilation of new information, practice of new skills, or development of new attitudes.

¹Ten Principles of Adult Learning retrieved from <https://appd.s3.amazonaws.com/docs/meetings/2013SpringPresentations/WS51Handout3.pdf>

²Teaching Adults: What Every Trainer Needs to Know About Adult Learning Styles <https://www.pacer.org/publications/fasttraining/Other/teachingadults-whattrainersneedtoknow.pdf> and What are Adult Learning Styles and How Do They Affect eLearning? <https://www.udutu.com/blog/what-are-adult-learning-styles-and-how-do-they-affect-elearning/>

- ✓ Adults learn better when there is a focus on relevant and realistic problems and the practical application of learning.
- ✓ Adults learn better when there is guidance and some measure of performance, so learners have a sense of progress toward their goals.
- ✓ People learn better from trainers they like.

For more information on the Principles of Adult Learning go to:

<https://ltcombudsman.org/uploads/files/support/Local-Guidelines-Adult-Learning.pdf>

Setting up the Classroom

- ✓ Provide each trainee with their own manual. If possible, you may consider giving trainees their manual prior to training and ask them to review specific sections as “prework” before attending classroom training.
- ✓ Ensure the trainees know the time and location of the training sessions.
- ✓ Test all audio-video equipment and internet connections prior to the training.
- ✓ Make sure you always have pens, paper, business cards, and program brochures available during in-person training sessions.
- ✓ Consider having highlighters and sticky notes available for trainees to use.
- ✓ **If conducting the training virtually**, make sure all trainees can respond and engage in class discussions via speaker when possible, or at minimum in writing (e.g., chat box).

Trainer’s Notes

The content in black font in the **Trainer Guide** and **Trainee Manual** is identical. However, the Trainer Guide also includes Trainer’s Notes, which appear in *blue italics* throughout the text. These notes provide additional background information or helpful tips to further enrich the training experience. *Trainer’s Notes* are based on experiences of Long-Term Care Ombudsman program (LTCOP) representatives, National Long-Term Care Ombudsman Resource Center (NORC) materials, the State Long-Term Care Ombudsman Programs Rule (LTCOP Rule), and the Older Americans Act (OAA).

State-Specific Information

The curriculum is not a stand-alone, complete package containing everything an individual needs to be designated as a representative. The federal training standards³ require states to add their state-specific information for certain topics. To assist trainers, we have identified the required state-specific information to address within the introduction of each module as well as compiled a comprehensive list for the entire curriculum in the appendix.

We understand that including entire sections of program policies and procedures, or relevant state statute or regulations, may not be feasible if the text is too long to insert directly into the training materials. However, it is important to refer to applicable state-specific information as indicated. States may determine the most appropriate way to incorporate the information (e.g., review the information verbally, include a link to relevant policies and procedures, law, and/or regulations).

³ Final Long-Term Care Ombudsman Program Training Standards https://ltcombudsman.org/uploads/files/support/2019_LTCOP_Training_Standards.pdf

Within the **Trainer Guide** you will find the **bold, blue arrow (→)** to indicate where the information should be discussed or added.

For example:

→ ***Provide state information relevant to the history of the Ombudsman program.***

- ✓ Review each module and insert your State Specific Information before presenting.

Manage the Training Environment

As a trainer, you will cover a lot of material within a limited amount of time. Techniques to help manage the training session include:

- ✓ Arrive early to set up and ensure you are available for trainees that arrive early.
- ✓ Start and end on time.
- ✓ Provide adequate breaks and let trainees know when to expect breaks during the training.

You may find that trainees have questions that seem pressing at the moment but are covered later in the training. Or you may have trainees that want to share their personal experiences about a loved one that lived in a long-term care facility or about their work experience in a related field. To ensure that you can cover all the necessary material, it is important to manage the dialogue so questions and sharing of personal experiences do not dominate the conversation. Some tactful ways to manage time include:

- ✓ Explain that information later in the training may answer some of the current questions.
- ✓ Remind trainees that the case studies contained in the materials provide effective ways to discuss specific problems about long-term care in a more general way.
- ✓ Ask trainees to hold questions until the end of a section, or for another (specified) time.
- ✓ Suggest that trainees write down their questions and comments to share later.
- ✓ Use a white board or other means to keep track of questions (e.g., Parking Lot list) and review them at the end of the session.
- ✓ Offer to meet with the trainee after the session to discuss any specific questions or concerns.

After Presenting the Curriculum Content

- ✓ Confirm that the trainees understand the information provided.
- ✓ Outline the next steps in the certification process.
- ✓ Set expectations as to when trainees will complete each of the online modules.
- ✓ Provide additional resources, and support, as necessary.

Post – Classroom Components

States may have other required components that must be successfully completed prior to being designated as a representative of the Office (e.g., post-training assessment).