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Practical Steps. Big Results.

PACSTX
PROVIDERS ALLIANCE FOR COMMUNITY SERVICES OF TEXAS

25 Ongoing Training Techniques

October 2025

Sara Sherman

35 years experience in the DD field…

- **Lead Medicaid Policy Developer** - Ohio Department of Developmental Disabilities (Dep Director)
- **Managed Care Contract Manager** – Ohio Department of Medicaid
- **Section Chief HomeCare Waiver Clinical Services** – Ohio Department of Medicaid
  - Created Ohio's Private Duty Nursing Program
- **Director of Vocational Rehabilitation** – Licking/Knox Goodwill
- **ICF/IDD Administrator/Director** – 2 Agencies
- **Director of Residential Facilities Waiver Homes**
- **Metropolitan Housing Director**
- **Director of Services and Supports** Administrator – 2 County Boards of Developmental Disabilities
- **Project Manager for Ohio Department of Medicaid -** MMIS Managed Care System
- **Director of Provider Oversight - Ohio Medicaid HomeCare Waiver** – Public Consulting Group
- ASI – **Fiscal Management Services** in Missouri and Georgia
- **Advocacy & Protective Services(APSI)** Representative (Guardian Agency)
- **Community Employment Coordinator**
- **County Case Manager**
- **Activity Therapist** - Developmental Center

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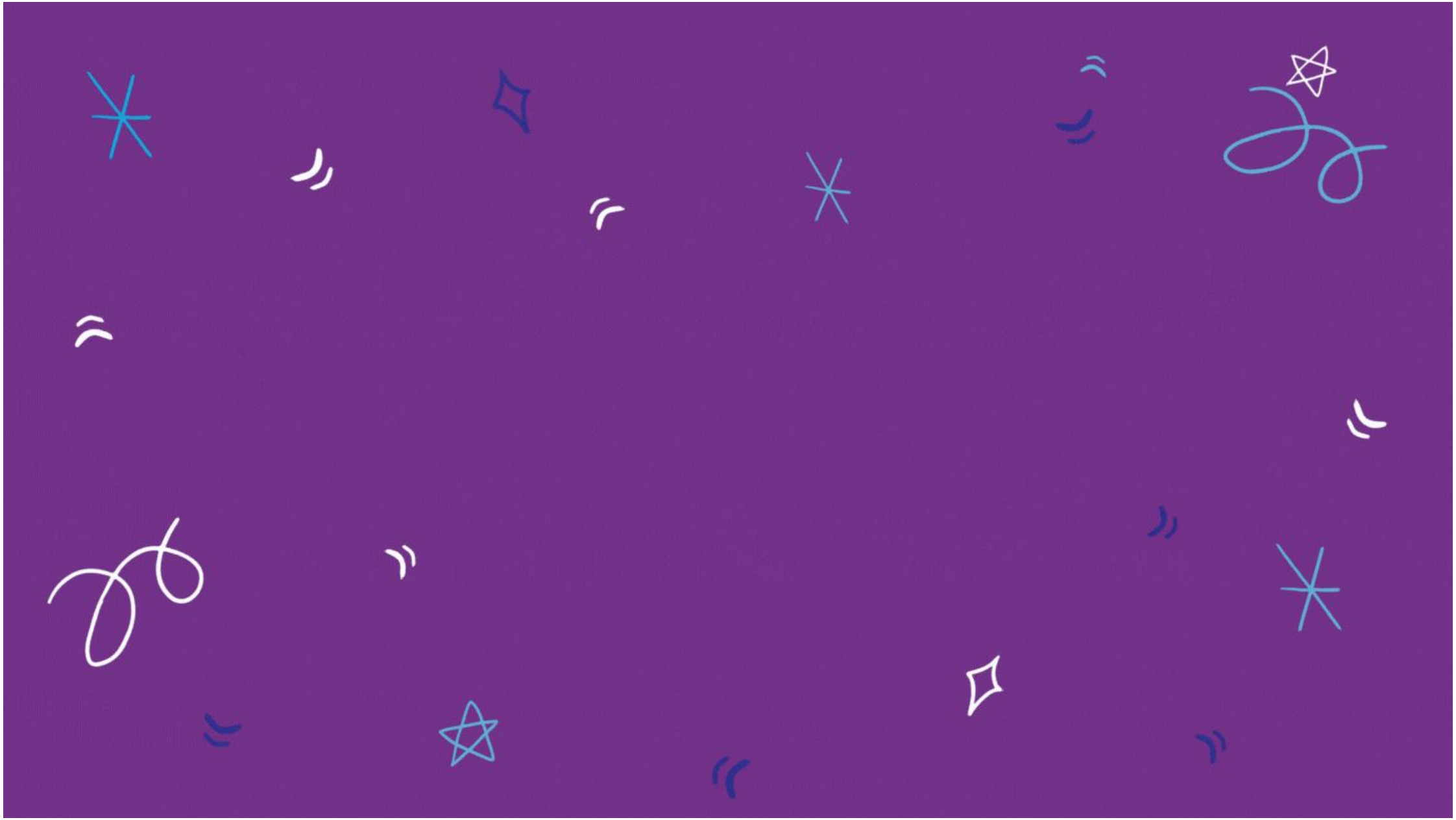

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So…training…

What's the big deal with training anyway?

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Why do we need *ongoing* training?

Ongoing training keeps people up on their skills and knowledge and is critical for both staff and supervisors/managers

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Root causes of non-compliance

- Fast Growth
- Poor communication and consistency
- Problems are severe by the time an audit finds them
- Lack of consistent staff
- Changes in leadership/mixed messages
- Lack of internal compliance system

- ***Lack of ongoing training***

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And ongoing training helps us to…

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- Ensure compliance
- Reinforce skills
- Remind staff
- Deliver better and consistent services
- Create knowledgeable staff
- Develop better communication between staff and management
- Set and reinforce the tone and expectations of the workplace
- Discover problems quickly
- PREVENT ERRORS AND KEEP PEOPLE HEALTHY & SAFE
- AND HELP PEOPLE WITH DISABILITIES LIVE THEIR CHOSEN LIVES

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Sounds good…right?

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So WHY is it so hard?

Don’t we have enough training?

- Initial Training
- Annual Training
- Individual Specific Training
- Med Admin Training
- Behavior Training
- Incident Training
- Etc…

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Why aren't staff getting this?

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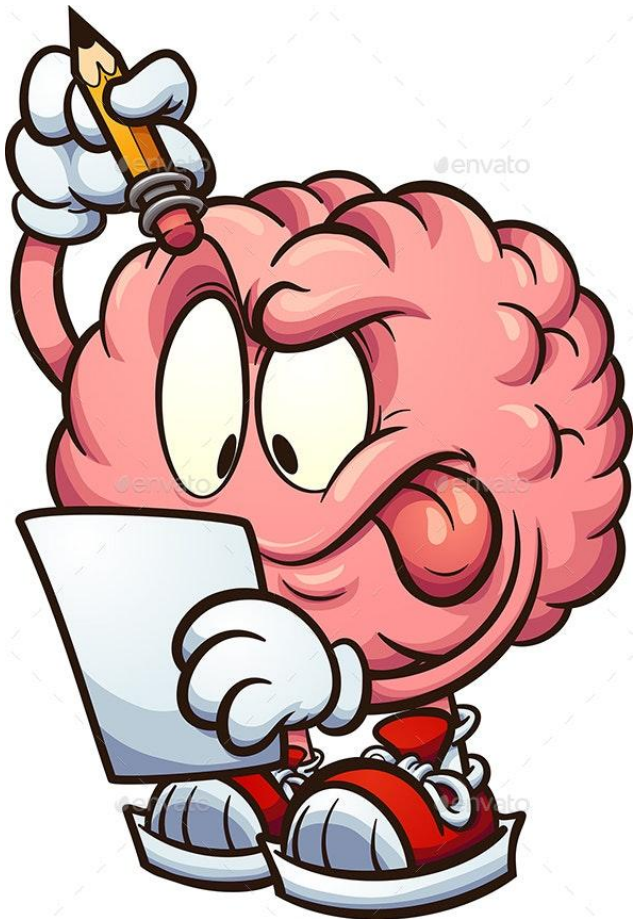
The Brain does not like change…



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We are hardwired to avoid change

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Rule of 7

13 - 15

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And that is assuming…

They even learned the information the first time.

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What do well-trained staff look like?

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Staff who are not well trained:

- Must ask a great deal of questions
- Are inconsistent
- Hesitate; or take no action
- Cannot apply information to new situations
- Are not confident
- Make mistakes
- Are frustrated
- Are not likely to stay
- May stay…

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What is it like to receive services?

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CORPORATE DILEMMA
WHAT IF WE TRAIN THEM AND THEY LEAVE?
WHAT IF WE DON'T... AND THEY STAY?
INVESTING IN EMPLOYEES

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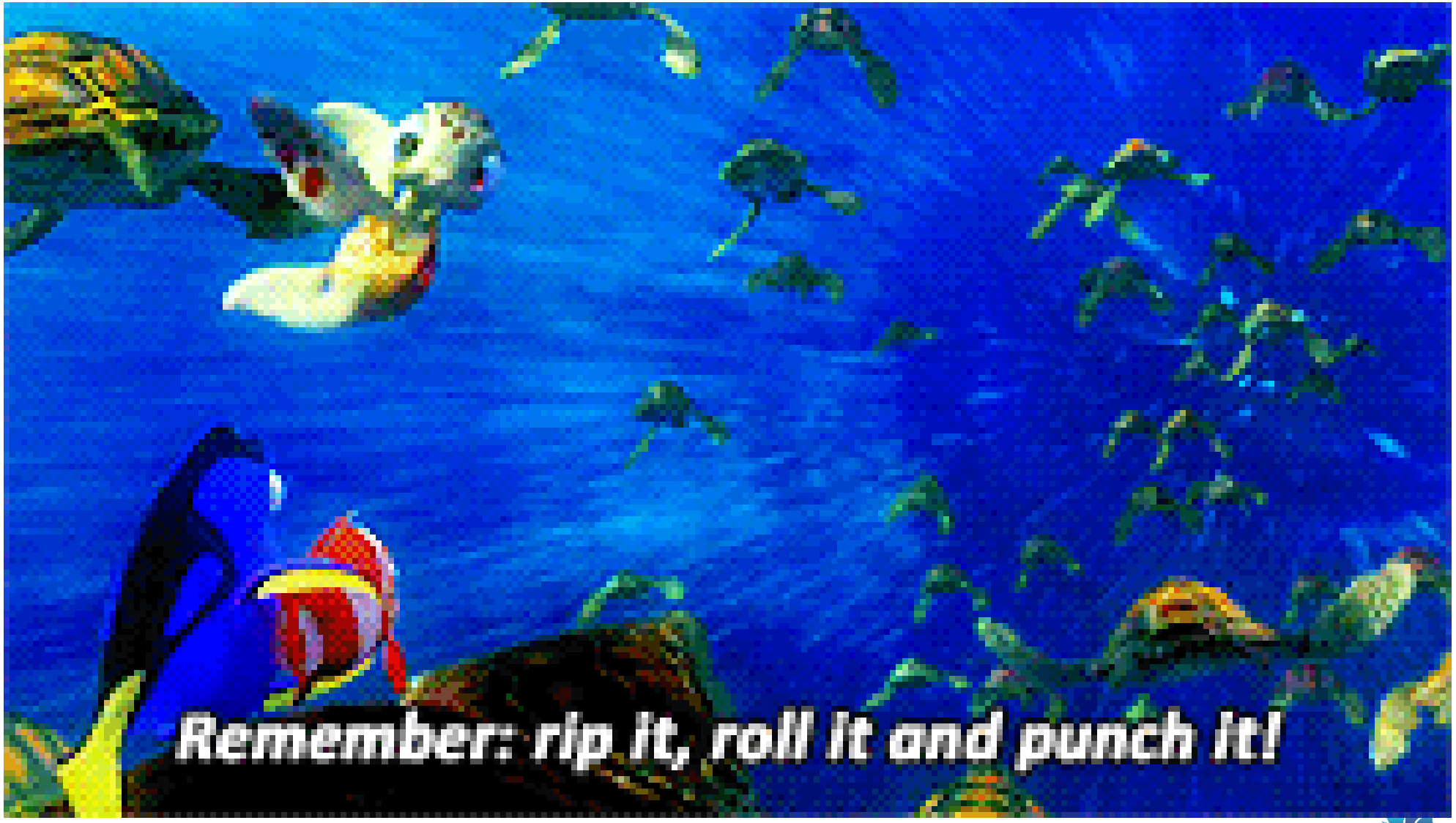

Finding Nemo – Walt Disney Productions

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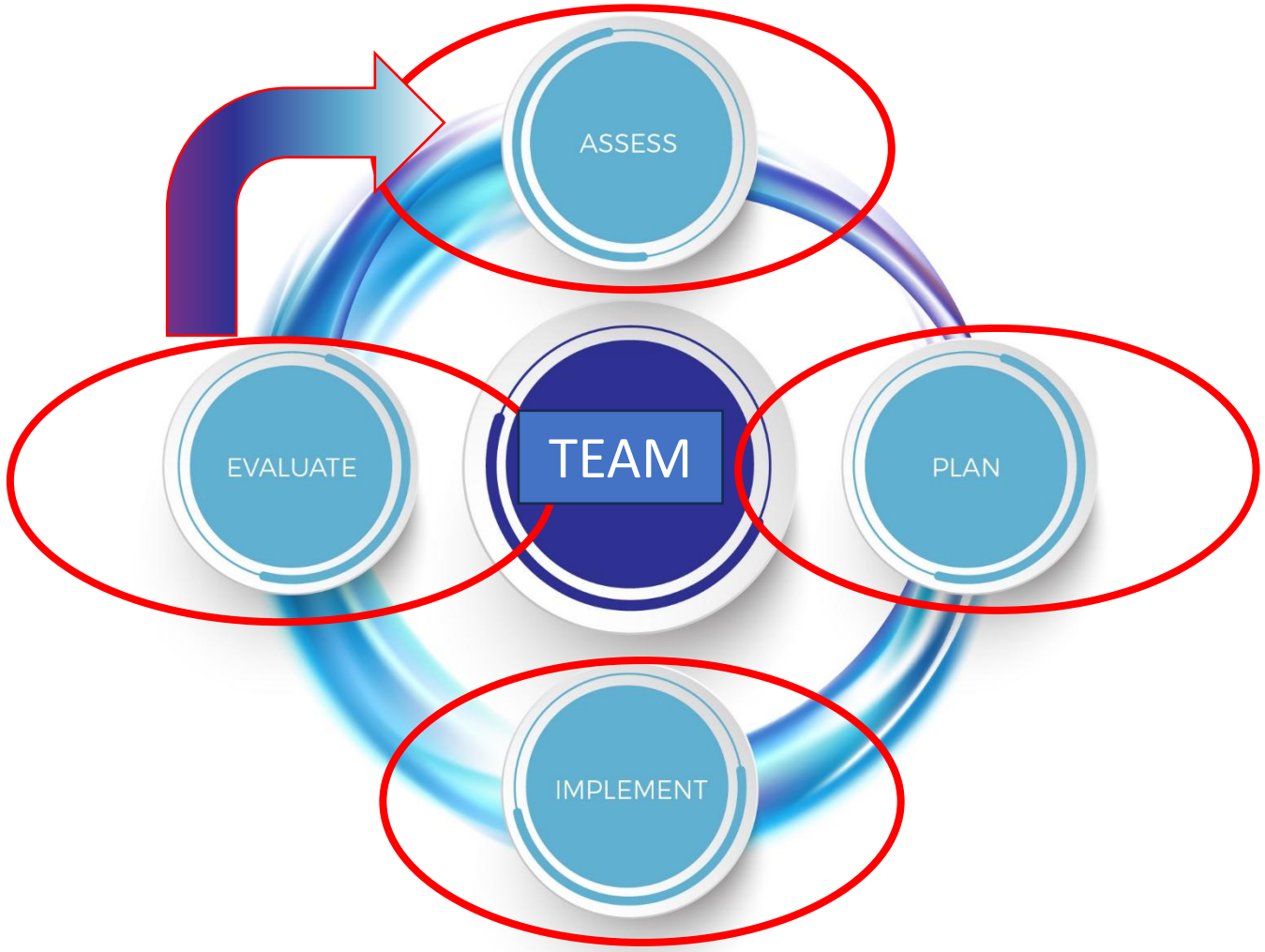
- Assess
- Plan
- Implement
- Document
- Evaluate
- Start again…



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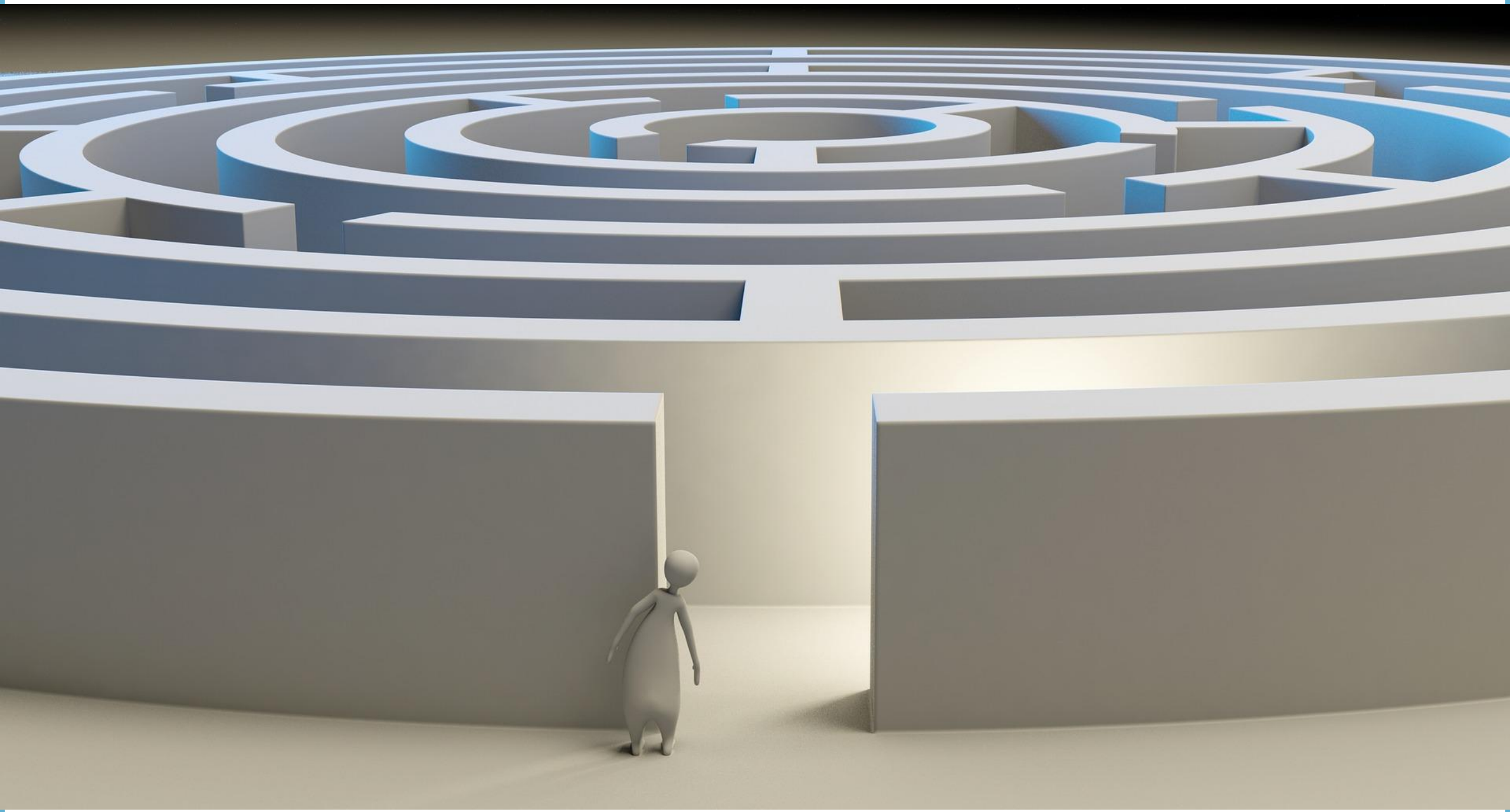

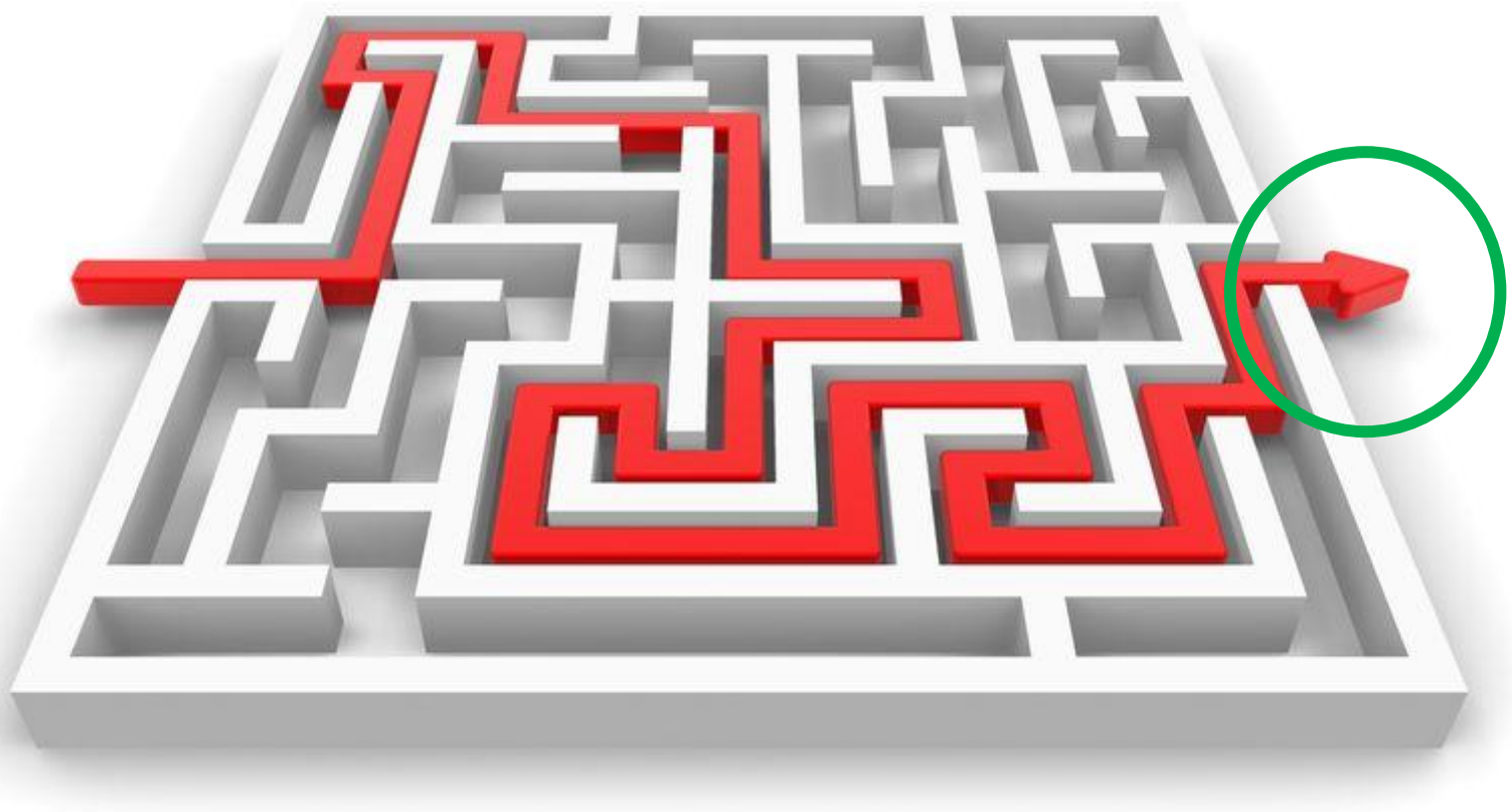

What does success look like?

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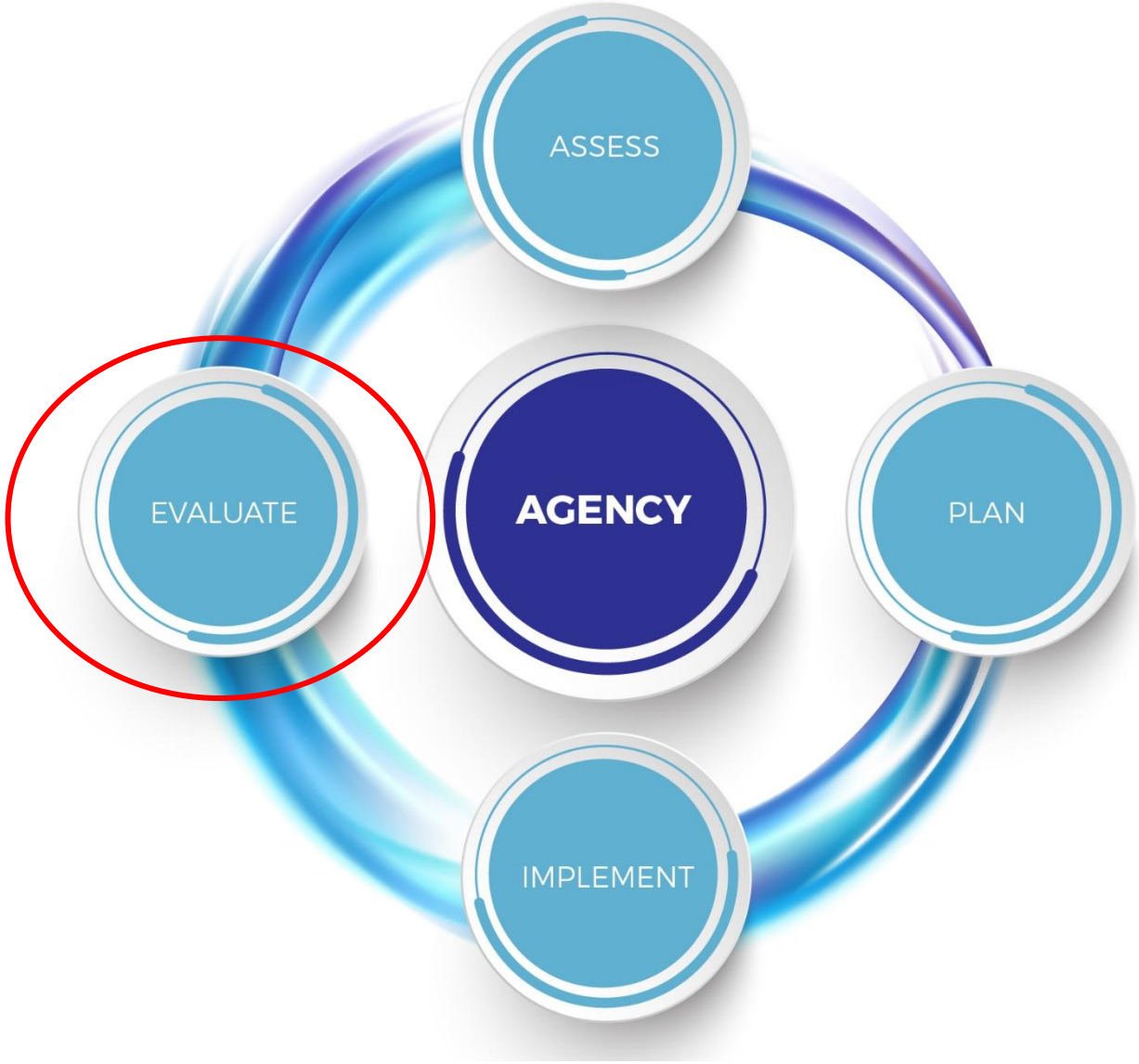
Spelling out success allows you to evaluate later



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Knowing what SUCCESS looks like…

- Helps staff know if they are doing it right
- Increases staff confidence
- Means services are in compliance
- Decreases questions
- Decreases errors
- Increases morale
- Save time and money
- Etc.

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25 Ways to Deliver Ongoing Training…On the Spot

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1. Online Games
2. In-Person Games
3. Lecture
4. Reverse Classroom
5. Pop Training/Lightening Round
6. Online Surveys/Quizzes
7. Flashcards
8. In-House Specialists
9. Put the Steps in Order
10. Match Process to Policy
11. Staff Quiz Each Other
12. Trainer for a Day
13. What's Missing
14. Peer Review
15. Treasure Hunt
16. How Many Can You Name in 2
17. Who Knows Me Better?
18. Role Play (Process, Beh Plans, Routines)
19. 2 Truths and a Lie
20. Team Challenge

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21. Create Proficiency Levels
22. Practice Compliance Reviews/Audits
23. Staff Perform Mock Reviews (Switch Teams/Houses)
24. Investigate Compliance Issues
25. Catch the Error
26. Develop Checklists and Auditing Tools
27. Read the Rule (and create the steps)
28. Solve the Problem

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Jeopardy

https://www.playfactile.com/training4staff/play

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Wheel of Fortune

As a dice game:

1 - Lose a turn
2 - 5 points
3 - 35 points
4 – 1 hour off coupon
5 – 10 points
6 – Free lunch
7 – 80 points
8 – 50 points
9 – 100 points
10 – Free spin

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https://youtu.be/QVPlyuG7L7s?si=9q1Leeekx4laOxPZ
https://www.gamesbytim.com/wheel-of-fortune-for-powerpoint/

Wheel of Fortune for PowerPoint

Download (Windows)

Download (Mac)

Version 6.4 (What's new)
Older versions
Released: January 1, 2012
Updated: November 6, 2023
Size: 3.4 MB (Windows), 3.3 MB (Mac)
Platform: PowerPoint
License: CC BY-NC-SA 4.0

Share this project

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Lightening Round!

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Proficiency Levels:

- Master, Leader, Cadette, Novice
- Eagle, Bear, Wolf, Tiger
- Level 3, Level 2, Level 1
- Black Belt, Brown Belt, Blue Belt

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Get the people you serve in on the games…

Have them ask questions about:

- Allergies
- Favorite foods, friends, activities, places to go
- Goals and outcomes
- Back up plan
- Medications
- Procedures
- Routines
- What else?

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Put ‘Em in charge…

- Choose the questions
- Identify the right or wrong answers
- Helps them learn their services
- Helps them learn to advocate for themselves
- Empowers them to direct their staff
- Prepares them to lead their meetings
- Involves them in their service delivery and their lives
- Gives them more control over their lives
- Make it FUN!

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Possible Topics to cover:

- HR Requirements
- Ongoing Monitoring
- Policies/Procedures
- Documentation
- Med Admin
- Rules
- Incident Reporting
- Rights
- Service Plans
- Behavior Support
- Money Management
- Outcomes
- Universal Precautions
- Compliance Requirements & Reporting
- Vehicles
- Doctor Appts
- Family/Friends
- Medications
- Definitions
- Call off requirements
- Etc.

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Sara's favorite incident questions come from:

- Incidents that were caused by staff action or failure to act
- Prevention Plan Implementation
- Given an incident, can staff accurately complete the incident report
- Given an incident, can staff accurately complete a witness statement
- Identifying causes and contributing factors
- Create a prevention plan from causes and contributing factors
- Conduct an interview about an incident…without asking yes/no questions

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Rewards!

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Carol Baskins Shirt System

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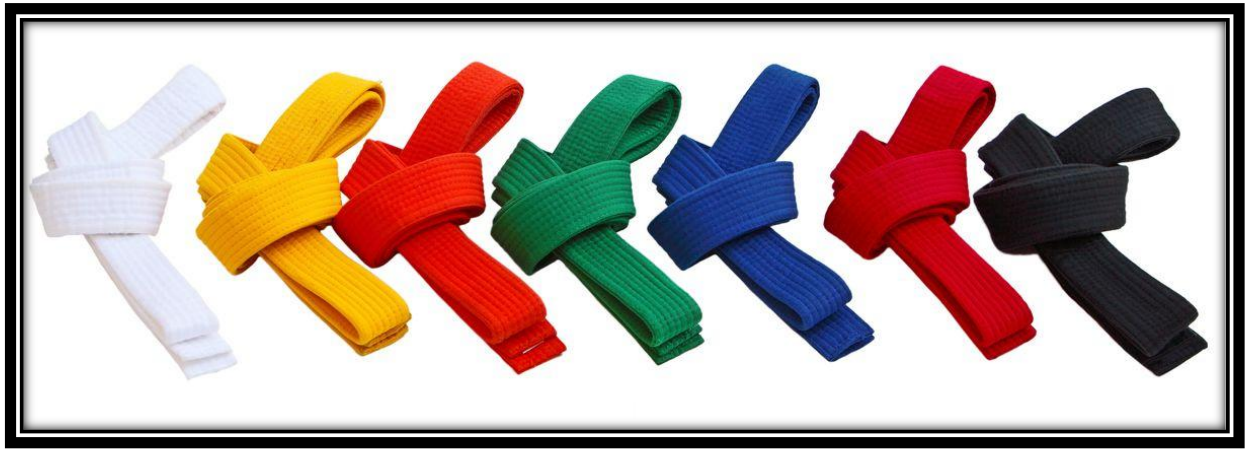
Reward and acknowledge



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Team Competitions

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Documentation

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Random training sheets…

(By site, by staff, etc.)

Date	Training questions	Staff	Supervisor
4/7/25	What is a possible side effect of Steve's iron pills and how do we monitor for that? *Missed question – gave answer, repeated correctly "being tired"*	Steve V	Sara S
7/14/25	Name 5 of Dawn's friends *Nailed it! – Tom, Maria, Alex, Rene', Angelene*	Steve V	Sara S
4/7/25	What do you do when there are only 2 days left of medication in the house? *Notify supervisor – Nailed it*	Steve V	Sara S
8/19/25	Name 5 examples of UI's and tell how to report them. Include timelines.		
4/7/25	What song do you do chest compressions to when performing CPR?		
3/20/25	When does your driver's license expire?		

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Where to document…

- Google Docs
- Spreadsheets
- Documentation systems/apps
- Paper

Make a process…follow your process

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Act on the Analysis

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Define...

- What will you collect and in what format?
- When data is it analyzed?
- How is it analyzed?
- How is it reported?
- When is it reported?
- To whom is it reported?
- How is the data used?
- How is progress tracked?

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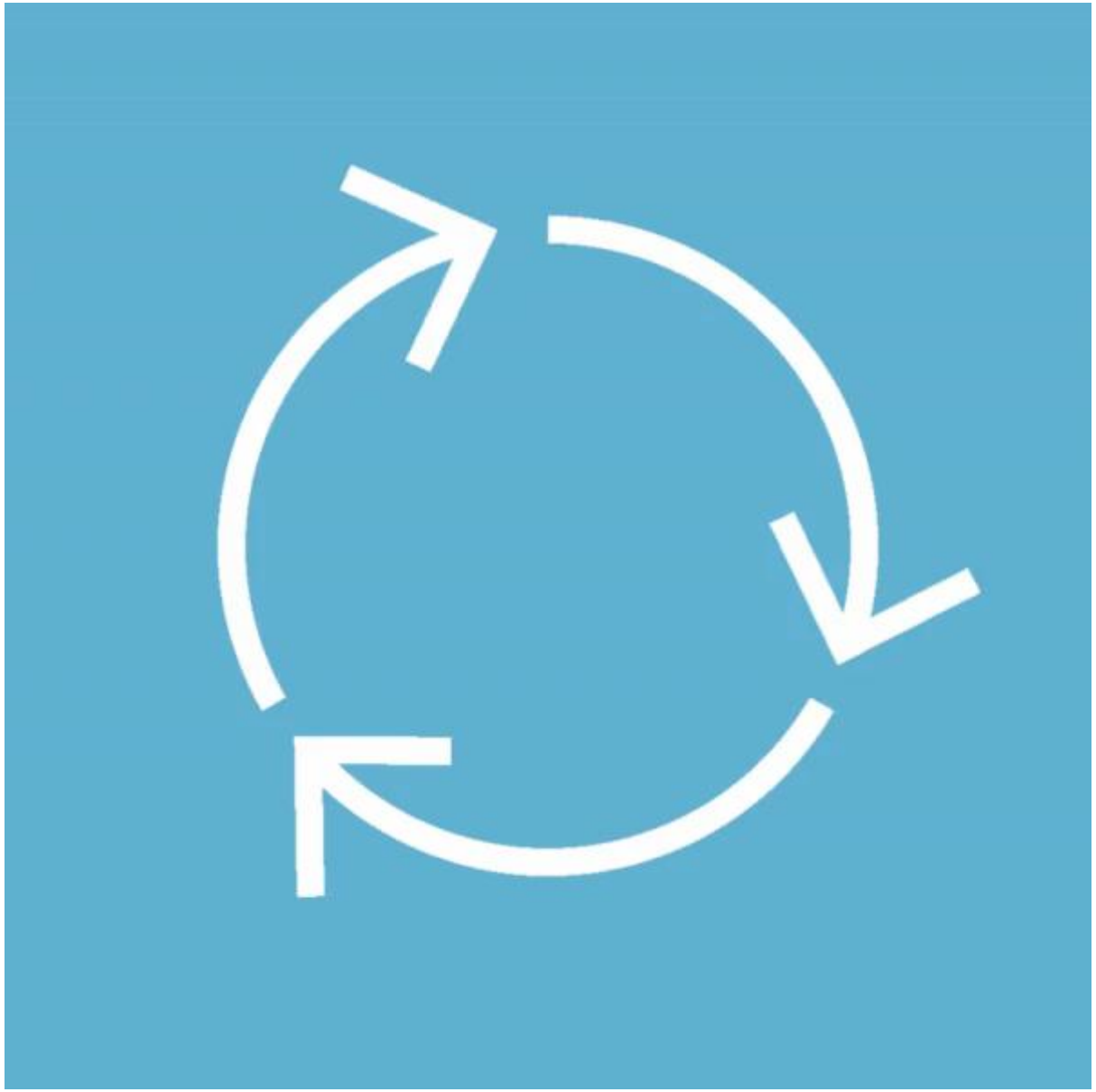

Feedback Loop

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Review:

1. Understand that the brain doesn’t like change
2. Repeat information at least 7 times
3. Ongoing training supports compliance and consistent service delivery
4. Include individuals you serve
5. Have fun
6. Document
7. Build in a feedback loop

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SESSION SURVEY

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