



The National **Long-Term Care**  
**Ombudsman** Resource Center



# **Train the Trainer: LTCOP Initial Certification Training Curriculum**

November 16, 2022



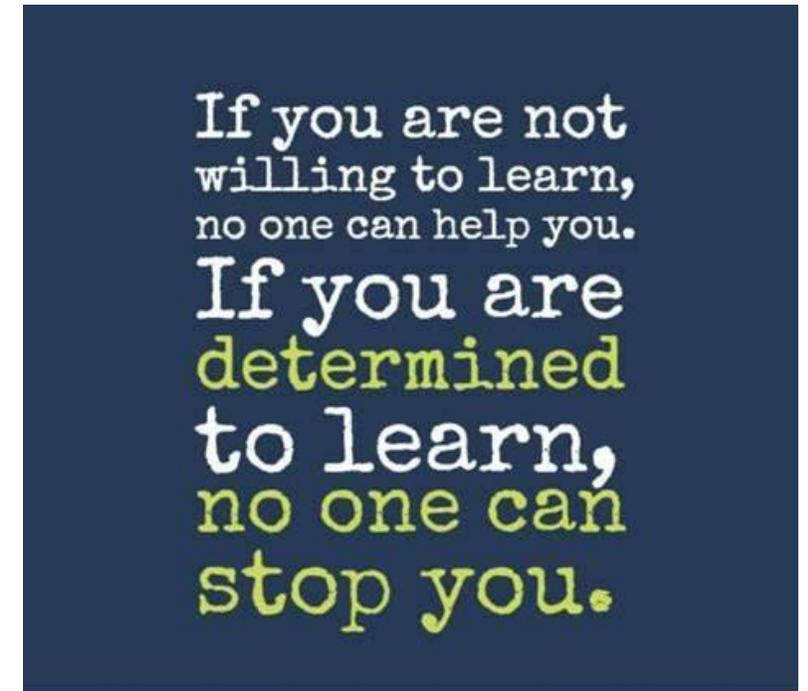
**Welcome!**



# Adult Learning

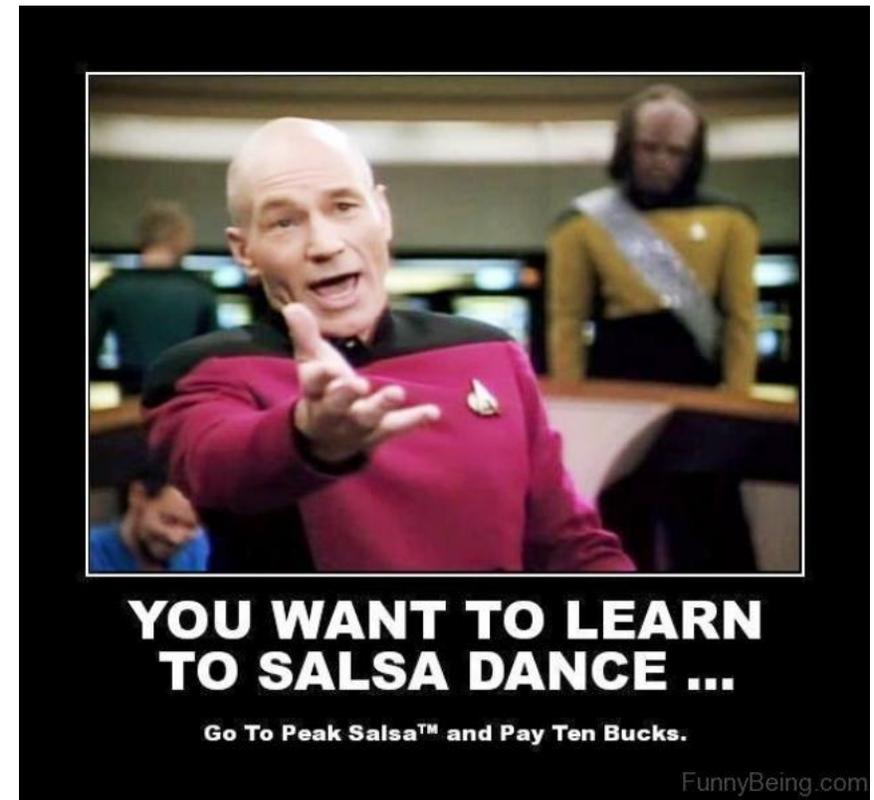
# Andragogy is the “art and science of teaching adults.”

- ▶ *Guidelines to Guidelines to Adult Learning From: Train the Trainer* by Susan Hosch for the Florida Long Term Care Ombudsman Program
  - ▶ Adults Must Want to Learn.
  - ▶ Adults Will Learn Only What They Feel They Need to Learn.
  - ▶ Adults Expect Information to Be Useful Immediately.
  - ▶ Adults Learn by Doing.
  - ▶ Adult Learning Centers Around Solving Realistic Problems.
  - ▶ Segment Information into Manageable Portions.
  - ▶ Experience Affects Adult Learning.



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- ▶ Adults Learn Best in an Informal Environment.
- ▶ Structure for Success.
- ▶ A Variety of Methods Should Be Used.
- ▶ Repetition Improves Retention.
- ▶ Adults Want Guidance, Not Grades.



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

## ► [Train the Trainer Session – Adult Learning Skills](#)

(November 2021)

This Train-the-Trainer session from the 2021 Consumer Voice Virtual Conference was designed for Ombudsmen and representatives that conduct training for new paid and volunteer representatives of the Office. Training for Ombudsman program representatives is critical for maintaining an effective program. View the [recording](#), [PowerPoint slides](#), and [handout](#) to learn how principles of adult learning can help ensure your "students" are successful in advocating on behalf of residents of long-term care settings.

Learning Principal	Explanation	Application
Self-directed	Learning at one's own pace in one's own way	You know <i>what</i> you need to learn and set your own goals, track down materials, and create a plan to foster your own learning, then self-evaluate.
Transformational	Learning can change your perspective on the world and vice-versa	Whether from a teacher, a mentor or some other channel, new information can shift a person's worldview and challenge their preconceived notions. In shifting the learner's outlook, the information becomes both applied and retained.
Experiential	Focuses on developing life experience or "hands-on" learning	Participate physically in the learning environment ("getting your hands dirty") and then reflecting on what worked and what didn't.

Learning Principal	Explanation	Application
Mentorship	Learning from an outside mentor (established figure) in a field	Mentors and mentees can learn from each other. (Mentees ask challenging questions, mentors challenge proteges' understanding of the material.)
Orientation to (or of) learning	Adults need to reframe their emotions and assumptions around the experience and value of learning	Educators instruct their students on how to apply new lessons in the real world, which helps students retain information.
Motivation	Children are motivated by parents and laws requiring their education; adults often have internal motivation	Adults put in the time and effort to learn because they've typically internalized their motivation, whether it's career success, the prestige of a degree or a better salary.

<b>Learning Principal</b>	<b>Explanation</b>	<b>Application</b>
Readiness to learn	As a child matures, they reach a certain threshold of learning readiness (such as reading or basic math facts), but adults have already been through this development and need to rely on past experience or life changes to develop a renewed readiness	Renewing your readiness to learn as an adult often happens by way of a situational trigger. Perhaps you lose your job or want to switch careers, for example. Or perhaps your next promotion hinges on mastering a skill.

<https://www.phoenix.edu/blog/adult-learning-theories-principles.html>



# **Training Materials**

# NORC Certification Training Resources

► [https://ltcombudsman.org/omb\\_support/training/norc-curriculum](https://ltcombudsman.org/omb_support/training/norc-curriculum)

## The training materials include:



**Trainer Guide**



**Trainee Manual**



**PowerPoints**



**Curriculum Overview**



**Preparation Checklist and Training Tips**



**Glossary of Key Words**



**List of State-Specific Information**

# Module Seven and Module Eight

## The Stages of Long-Term Care Ombudsman Program Complaint Processing

Figure 1

STAGE 1 INTAKE, PLANNING, INVESTIGATION, AND VERIFICATION	
<b>Intake</b>	Receive problems, concerns, and complaints. Confirm the resident's perspective of the problem. Determine if the problem or concern is a complaint as defined by the LTCOP.
<b>Develop an Initial Plan of Action with the Resident</b>	Advise resident of rights and discuss their desired outcome and possible solutions; obtain consent to act and consent to identify the resident when speaking with involved parties. Seek consent to access records when applicable. Determine who is responsible for all required actions within the plan.
<b>Investigate</b>	Collect information from interviews, observations, and records (when necessary).
<b>Verify</b>	Review information gathered. Determine if the complaint is generally accurate and if further action is needed. If no action is needed, complaint processing stops here, except for documentation.
STAGE 2 ANALYSIS AND PLANNING	
<b>Analyze</b>	Once the complaint is identified and verified, consider the root cause(s). If the complaint is not verified, but the resident's perception of a problem exists, determine the root cause of the problem and if there is a need for LTCOP involvement.
<b>Revisit the Plan of Action with the Resident</b>	Review the desired outcome and possible solutions. Determine if any changes need to be made to the plan of action. Anticipate barriers to select an appropriate approach and identify alternative strategies if needed.
STAGE 3 IMPLEMENTATION AND RESOLUTION	
<b>Act</b>	Proceed with implementing the agreed-upon plan of action.
<b>Assess</b>	Check back with the resident and others involved to measure the progress of the plan. Determine if alternative actions need to be considered.
<b>Resolve</b>	Follow up to confirm with the resident that the complaint is resolved or partially resolved to their satisfaction.



# Mrs. Bronner's Purse



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# Mrs. Bronner's Purse

What we learned from interviews and observation (Stage 1)

- ▶ The Ombudsman program (LTCOP) has permission from Mrs. Bronner to talk to her daughter, Stephanie, and the Social Services Director, Anita.
- ▶ The missing purse is a brown handbag containing a wallet and special pictures.
- ▶ Mrs. Bronner keeps the purse on the chair, next to her bed.
- ▶ The purse is not in her room.
- ▶ Mrs. Bronner often misplaces her purse, usually leaving it in the dining room or the activity room.
- ▶ Neither Stephanie nor Anita have attempted to locate the purse.

# Mrs. Bronner's Purse



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# Reminder

- ▶ Consult with your State Ombudsman and ensure all state-specific information has been added to the materials
- ▶ Review all resources on the NORC website
- ▶ Familiarize yourself with all certification training materials
- ▶ Plan, prepare, and provide



# WORKING WITH THE NEW CERTIFICATION TRAINING CURRICULUM IN NEW YORK STATE

Mary Keniry, JD LMSW

Program Director, Long Term Care Ombudsman Program

New York State Region 6

## OVERVIEW OF NEW YORK STATE REGION 6

- 10 upstate counties surrounding Albany, the capital of New York
- Staff of 3 full time state certified ombudsmen and 16 active volunteers assigned primarily to nursing homes.
- Region covers 45 nursing homes, 55 assisted living facilities, and 20 family type homes
- Roughly 10,000 long term care beds served

# LTCOP Regions

- 1 Family Service League
- 2 Family and Children's Association
- 3 Center for Independence of the Disabled
- 4 Long Term Care Community Coalition - Tri County LTCOP
- 5 Long Term Care Community Coalition - Hudson Valley LTCOP
- 6 Catholic Charities Service and Caregiver Support Services
- 7 North Country Center for Independence
- 8 Northern Regional Center for Independent Living, Inc.
- 9 Resource Center for Independent Living
- 10 ARSE Child and Family Services, Inc.
- 11 Action for Older Persons
- 12 Tompkins County Office for the Aging
- 13 Lifespan
- 14 AAI Independent Living Center, Inc.
- 15 People, Inc.



TRAININGS  
CONDUCTED USING  
THE NEW  
CURRICULUM

- Our region hosted 4 trainings in the past year. Training lasts 30 hours broken down into 5 six-hour weekdays.
- We present two modules per day for a total of 10 modules.
- Curriculum presents training options: in person, virtual, or a hybrid.
- All 4 of our trainings with the new curriculum were virtual.
- Complete training is 36 hours with 10 hours of field work

## CHALLENGES OF VIRTUAL TRAINING

- Training is held over the course of a week or two.
- 5 full days of training with two modules per day covered for a total of 10 modules.
- Class size ranged from 7-12 trainees, both staff and volunteers.
- Need to plan for taking questions and allocate sufficient time to give everyone a chance to share during interactive portions.



## TRAINING PREP

- All trainees are provided with both a hard copy of a trainee manual as well as a digital copy of the trainee manual
- Trainees are given dates of training roughly 6 weeks in advance and asked to hold the dates.
- As training week approaches, trainees are sent links to the meetings, and in an email to all trainees, go over the parameters, time frames, and expectations for the meetings.
- Trainees are told that the training is designed to be interactive, and that to be certified, their active participation is required.
- Trainers are selected, modules are assigned to specific trainers, and trainers familiarize themselves with content.
- Trainers practice with virtual platform, testing headset, microphone, sharing features, and making sure video with sound is working properly.

# Welcome!

- Your name
- Where you are from
- Name the “aha” moment that brought you here today
- What you hope to gain from this training

## TRAINING CURRICULUM IS INTERACTIVE

- We take advantage of all the interactive content in the curriculum.
- Each module has a “welcome back” section at the beginning that serves as a good check in and reminder of who’s who.
- We tell trainees to ask their questions as they come up instead of saving for the end of a section or module.
- Curriculum has many spots for role playing, interaction, and skills applications for homework during break times. We make the most of these times for sharing.



# CUSTOMIZING TO OUR REGION

- There are many places in the curriculum where we as trainers are asked to share region-specific information with the trainees, ranging from the facility numbers and types in our region to specific experiences with residents and particular cases we investigate.
- When assigning a module to a trainer we take advantage of trainer's strengths!



# STATE SPECIFIC INFORMATION

# Residential Care Communities

Adult Care Facilities (ACF)

Family Type Homes (FTH)



## THE PROOF IS IN THE PUDDING!

- Some of our trainees trained under this curriculum are still relatively new, but so far, they are outperforming their peers trained in the older methods in terms of complaint resolutions, resident council attendance, and time spent in facilities.
- Curriculum reminds trainees that they have our support at all stages of the training process and beyond. Curriculum stresses that they don't need to memorize anything, and we tell our trainees that we are with them all the way, phone, text or email with any kind of question, great or small.



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# Speakers

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# Connect with us!

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 The National LTC Ombudsman Resource Center

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Get our app! Search for "LTC Ombudsman Resource Center" in the Apple Store or Google Play

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