

# 6 Considerations On How Often Your Organization Should Train

A CPI White Paper



# How often should we train?

At CPI we're often asked, "How often should we conduct refresher training?"

Seems like a simple question, but there are many considerations you should make before reaching a hard and fast decision.

Training in crisis intervention, in both verbal de-escalation and in physical interventions, involves perishable skills that can degrade over time, especially if staff don't need to call upon those skills frequently. As such, ensuring that the skills and strategies staff learn in the [Nonviolent Crisis Intervention®](#) program are learned and maintained is critical for creating a culture of *Care, Welfare, Safety, and Security*<sup>SM</sup> throughout your organization. When staff are equipped to confidently identify and defuse challenging or disruptive behavior at its earliest stages, they can spend more time developing Therapeutic Rapport with the clients they serve.

The question of training frequency should not be taken lightly. To help answer the question, a training needs assessment is useful for making a data-informed decision about how often your staff should train. Additionally, in many jurisdictions, state, regional, and local policy also dictates a minimum requirement for how often staff should attend training. We can also consider how the return we receive on our investment in training can help guide our decision about how often to train, and what can be found in research literature about learning retention.

Just as significant is considering the assets your organization has for formal and informal learning opportunities. Training doesn't always have to be a formal, sit-down lecture, and often staff can be engaged with more frequent, but less formal learning opportunities to practice and refresh the skills they learned in the initial training program.

Of course, Instructors need training too. And because CPI teaches programs in a train-the-trainer format, much research has been done to look at how often trainers should come back to recertify to ensure the fidelity of the programs they teach.

So to answer the question of training frequency, we'll look at a variety of considerations, including training needs assessments, policy and regulatory requirements, what best-practice guidelines tell us, and what learning retention research literature suggests.

When staff are equipped to confidently identify and defuse challenging or disruptive behavior at its earliest stages, they can spend more time developing Therapeutic Rapport with the clients they serve.

# 1. TRAINING NEEDS ASSESSMENT

Perhaps the most important facet of knowing who needs training and how often refresher training should occur is having a system in place to conduct an ongoing needs assessment.

Needs assessments are tools that can be used to identify gaps in skills/knowledge/attitude, and they can be used within any part of the Training Process. They basically tell us where we are and where we want to be in the process of implementing and applying *Nonviolent Crisis Intervention*® training.

By allowing us to identify where there may be gaps in staff performance and which elements of the ongoing Training Process will help us bridge those gaps, needs assessments can help us maximize our efforts before and after training.

Needs assessments can take the form of a long-term, highly structured analysis of staff needs, or they can be done on a more informal basis. A primary goal is to help us make informed decisions about the next step or steps in the Training Process.

Needs assessments can be most effective if done on an ongoing basis, each time you implement or use a component of the Training Process.

There are many different methods you or your organization can use to determine the training needs of your learners, including:

- Surveys
- Interviews/Focus Groups
- Early Pre-Tests
- Incident Reports
- Course Evaluations/Post-Tests
- Observation

Each of these methods has advantages and disadvantages. As such, consider using more than one method to conduct your training needs assessment. For instance, surveys can allow you to collect data from a large number of people at one time, but those responses may lack objectivity and staff may tell you what they think you want to hear, rather than what you need to hear.

Consider also that there might be two perspectives to assessing the needs of your learners. An organizational perspective will look at the needs of your organization (or departments within your organization) as a whole. An individual perspective will look at each learner individually to determine what skills, knowledge, or attitude is in need of additional training.

An additional consideration for assessing an organization's individual training needs is the following quote from US Secretary of Education Arne Duncan. In a letter [outlining 15 core principles for schools to consider for reducing the use of physical restraint and seclusion](#), he wrote:

"At a minimum, training on the use of physical restraint and seclusion and effective alternatives should be provided at the beginning and middle of each school year. However, such training should be conducted more often if there are enrolled students

Needs assessments are tools that can be used to identify gaps in skills/knowledge/attitude, and they can be used within any part of the Training Process.

with a history or high incidence of dangerous behavior who may be subjected to physical restraint or seclusion procedures. In addition, school administrators should evaluate whether staff who engage in multiple uses of restraint or seclusion need additional training.”

## 2. REGULATORY REQUIREMENTS

Because physical restraint and crisis intervention involve risks, federal and state legislators and regulators have recognized the importance of having staff educated in techniques to prevent and respond appropriately to challenging behavior. Federal and state regulations also recognize the importance of having staff update their skills in crisis management on a periodic basis, to ensure that the skills they have learned are maintained.

It’s common for these regulations to formalize not only what training requirements an organization needs, and to whom those regulations apply within that organization, but also how often that organization needs to conduct refresher training.

Legislation that’s related to education, special education, human services, mental health, and security often requires similar training topics when it comes to addressing challenging or disruptive behavior. These include proactive behavior management strategies, crisis de-escalation, non-injurious crisis intervention, and restraint and seclusion, to name a few. Along with training topics, there are also often definitions and restrictions on each kind of restraint that may be performed. In cases where regulations require organizations to use training from an approved provider, CPI ensures that our training aligns with the specific training requirements and obtains approved provider status.

Staff that require training within each organization and field are usually noted within the legislation. This can vary from state to state. For instance, a legislation may apply to anyone within the organization that may need to use de-escalation techniques, restraints, or proactive behavior management strategies. In another example, the state legislation may also report that all employees within the field being defined need to be trained within 30 days of hire, and yearly afterwards. This leads into the frequency in which organizations need to train. CPI recommends that Certified Instructors consult any applicable federal or state policy to ensure compliance with any specific requirement.

Legislation and regulations often also define the frequency with which an individual within the organization needs to train. This could be listed as specifically as 10 hours a year, yearly with a successful passing of a competency test, or as vaguely as “periodic” or “ongoing” training. The more vague the wording, the more the regulatory bodies are essentially relying on the training provider and the organizations implementing the training to establish a needs analysis process to determine what frequency is the best fit for an organization. This tends to be at least annually, but can also be more frequent, depending upon the needs of the staff within the organization.

Generally speaking, for hospitals and behavioral healthcare providers, the requirements tend to be based more on federal requirements, such as regulations from CMS or standards from the Joint Commission. For schools, because there is little federal

It’s common for these regulations to formalize not only what training requirements an organization needs, and to whom those regulations apply within that organization, but also how often that organization needs to conduct refresher training.

guidance governing physical restraint use, requirements for training are much more on a state-by-state basis.

**A report by Propublica** highlights the differences in state requirements regarding physical restraint training. In examining the patchwork of state requirements, the following trends are observed:

<b>PHYSICAL RESTRAINT TRAINING REQUIREMENTS IN THE US</b>	Number of states with requirements regarding children with disabilities	Number of states with requirements regarding all children
Physical restraint is limited to emergency use only.	14	19
Physical restraint should not obstruct/restrict breathing.	21	28
Less intrusive methods must be used first.	18	24
Training in de-escalation is required.	18	23
Training in PBIS is required.	10	16
Training in the risks of seclusion/restraint is required.	7	9
Certification or periodic re-training is required.	7	0

Because training requirements vary from state to state, and vary from profession to profession within each state, CPI monitors and analyzes changes in legislation that might affect an organization using our training. More information on specific requirements can be found on [crisisprevention.com](http://crisisprevention.com), and organizations are invited to contact CPI's Instructor Services with any questions regarding new or existing legislation.

### 3. MAXIMIZING THE RETURN ON TRAINING INVESTMENT

The different regulatory requirements basically constitute the bare minimum of care, or what legislators and accrediting bodies have found to be the very least an organization should do to ensure the safety of clients and staff. Many organizations choose to exceed that standard, though, by pursuing better outcomes: safer workplaces, improved climate, fewer restraints, reduced suspensions, etc.

Part of that pursuit is to train staff, not just more frequently, but more effectively. Training is a significant investment for any organization, and that investment should be used for the maximum benefit of the organization. CPI could release a blanket statement saying all staff should receive refresher training every X months, but truly, that decision should be based on the unique variables of each organization and each individual learner. How often an organization should train, and what that training should entail, is a decision best made based on the returns the organization is looking to receive from the training.

At its essence, Return on Training Investment, according to the ROI Institute, is a ratio based on how much benefit the organization receives divided by the training costs.

Quantifying a dollar value for the benefits received from training can be difficult, and even more so if attempting to calculate how frequency of training can affect the total benefit.

Training more frequently increases cost for the organization. So adding cost to the bottom side of an equation, without a proportional increase in benefit, can reduce the overall ROI ratio.

New skills that are used less frequently can decay over time, and reinforcing those skills just before that decay happens is the essential function of refresher training. Staff who use those skills more frequently on the job might experience decay at a slower rate. So maximizing the return on investment means hitting a sweet spot, near the time when skills begin to erode.

As stated earlier though, that sweet spot is going to be different for each organization and perhaps every learner, and CPI is glad to help organizations make those determinations.



#### 4. LEARNING RETENTION RESEARCH

Merriam-Webster defines retention as the ability to remember things easily or for a long time.

Learning + retention is in the domain of the Certified Instructor and is, ideally, a collaboration between you, each of your learners, and your organization.

Many studies have been conducted to examine how best to improve retention during the learning event itself, and are concerned with how the event is structured to support the needs of adult learners. Among these is Bloom's Taxonomy of Learning. Another widely cited adult learning theory, Edgar Dale's Cone of Experience, or learning pyramid, **has, over the years, been misquoted** to say that we retain five percent of what we see/hear, 10 percent of what we read, 20 percent through visual, and 30 percent by demonstration. The original intent was for these percentages to be used as a guideline rather than to represent absolutes.

But regardless of the learning theory, repeated exposure to the presented content has been shown to be effective for retaining learning. A training event results in the learner gaining knowledge, skills, and an impact on attitudes. Supporting this learning beyond the confines of the classroom is critical for retention over time. More recent research has examined the importance of a more holistic approach, including how retention can be affected before, during, and after the event itself using a continuous learning model.

**An article by the Association for Talent and Development** addresses how the study of brain science and learning, or neuroeducation, supports the concept of continuous learning as a key to retention. This field is investigating the ability of the brain to continuously adapt in response to new learning opportunities. It seems that to become proficient in applying new learning, we can exercise our brains much like we can exercise our bodies.

Support for continuous learning must include more than the learner and the Instructor. The organization itself can support learning efforts by providing multiple opportunities or exposures to content before, during, and after the event itself.

## 5. FORMAL AND INFORMAL REFRESHER TRAINING

When considering how often refresher training should occur, in addition to looking at the needs of the learner, an organization must also assess itself to determine the feasibility of a more aggressive Training Process. The training budget will always be a great concern, but there are also budget-friendly opportunities to conduct informal learning more frequently, and to help ensure that the learners within your organization have multiple opportunities for just-in-time training.

### FORMAL VERSUS INFORMAL TRAINING

	Training	Characteristics
Formal Training	Initial <i>Nonviolent Crisis Intervention</i> ® Training  Formal Refreshers: <ul style="list-style-type: none"> <li>• Key Point Refresher</li> <li>• Personal Prevention Plan</li> <li>• Effective Limit Setting</li> </ul>	Meets Standards  Blue Card™ confirmations  Receive training credit  No documentation required
Informal Training	<ul style="list-style-type: none"> <li>• Reviews</li> <li>• Situational Applications</li> <li>• Practice</li> <li>• Rehearsals and Drills</li> <li>• Policy Discussions</li> </ul>	Flexibility: Schedule, Format, Needs, Take advantage of "teachable moments"  Application focused  Skills assessment

First, it would be helpful to describe what we mean by formal and informal learning.

Formal learning is organized, structured, and has learning objectives. The learner's

objectives are to gain knowledge, skills, and/or competencies, and perhaps to receive a training certificate at the end of the course to receive CEUs. Most CPI Certified Instructors place their primary attention here, ensuring that the official course materials for initial *Nonviolent Crisis Intervention*® training and formal refresher courses are used.

But for some learners, more training is needed to help solidify the skills they learned in formal training. More frequent, but less time-intensive learning opportunities give the learner more ability to practice and apply the content to their work setting with less formality.

Informal learning is by nature less organized and more self-directed, and it may not have set objectives in terms of learning outcomes. From the learner's standpoint, it's less intentional and is often referred to as *learning by experience*, or just as *experience*. Think day-to-day work or life experience. For example, after debriefing an incident with a coworker, a learner discovers from her supervisor (who is a CPI Certified Instructor) that the supervisor uses the CPI *COPING Model*™ to apply how better to use Rational Detachment strategies from the *Nonviolent Crisis Intervention*® program. Or, by observing a coworker successfully using a limit-setting strategy, a learner gains confidence to try the strategy himself. Perhaps a learner downloaded the CPI Participant App to their smartphone to review the CPI *Crisis Development Model*™ and to better learn how to apply the model to a particular client's behaviors.

Between those is non-formal (semi-structured) learning, which can be somewhat organized and can have learning objectives set by the leader or by the participants. This might take the form of an organized, planned review of key *Nonviolent Crisis Intervention*® program concepts, crisis response team drills, or small group discussions during a formal training.

CPI recommends that organizations view training as an ongoing process and that learners never consider training to be "done" just because they have finished an initial or formal refresher.



CPI recommends that organizations view training as an ongoing process and that learners never consider training to be “done” just because they have finished an initial or formal refresher. Additionally, now more than ever, there are more ways to make CPI’s Training Process work for you, such as using technology to lessen the burden on you, the Instructor. You can do policy reviews via email reminder, or use online learning options to help facilitate formal or informal learning. You and your organization can also consider how social media and internal electronic communications can facilitate learning opportunities through tools such as your company intranet and internal communication networks such as Yammer.

To this end, CPI rolled out a new Instructor Community to help you network with other Instructors in your home town or around the world, ask questions and receive notifications when someone responds, and learn from each other’s experiences.

## 6. INSTRUCTOR RECERTIFICATION: REDUCING TRAINING DRIFT

Because CPI teaches the *Nonviolent Crisis Intervention*® program in a train-the-trainer format, another important question is, “How often should Certified Instructors come back to train?”

Through the Instructor Certification Process, Instructors and their organizations are granted a significant amount of trust to teach the program as it’s intended to be taught. Additionally, Instructors also have the responsibility of tailoring the content to have the greatest impact for each participant.

In an effort to do just that, an Instructor may be tempted to bring in external content, which, depending on how the content is presented and rolled in, can be either good or bad. As the Instructor continues to teach the program, the more he or she might drift into an area where program fidelity standards are not followed.

As such, attending a recertification program is about more than just refreshing skills in the program itself. It’s also about learning new ways to adapt and tailor the program content while adhering to program fidelity requirements. In addition to the formal recertification program, CPI also offers a multitude of informal training opportunities for Certified Instructors in the Training Center on [crisisprevention.com](http://crisisprevention.com), and in Instructor publications.

In 2015, CPI will roll out enhanced content for the *Nonviolent Crisis Intervention*® program, and a major focus of the enhanced content will be to assist in training drift reduction. Many of the enhanced components of the program are designed to allow the program to have a greater impact on learning retention and ultimately on better outcomes for your staff, your organization, and the clients you serve.

It’s also about learning new ways to adapt and tailor the program content while adhering to program fidelity requirements.



## ABOUT CPI

CPI is an international training organization that delivers the worldwide standard in crisis prevention and intervention training. Through a variety of specialized offerings, comprehensive resources, and unparalleled support, CPI offers proven and practical strategies for managing challenging behavior at the earliest possible stage.

Since 1980, more than 10 million professionals—from organizational leaders to direct care staff—have participated in CPI programs. CPI delivers training both on-site and at more than 150 locations across the globe. For more information, visit [crisisprevention.com](http://crisisprevention.com) or call 800.558.8976.

