Service & Support Administration and Program Management in Residential and Day Service Settings
A study funded by a grant from the Ohio Department of Developmental Disabilities, through the Ohio Provider Resource Association (OPRA)- Ohio Association of Superintendents of County Boards of Developmental Disabilities (OSCBDD) Communications Task Force and implemented by Dynamic Pathways, Inc. and Ohio Self Determination Association

Training Modules

**Limitations of the Project:** While the intent of the project was to identify best practice training for Program Management and Service & Support Administration, there were some difficulties encountered in doing so.

- Training information was requested through a survey process. The survey was distributed widely requesting volunteer participation. OACB sent the survey directly to SSA Directors and Superintendents; OPRA sent to their membership and posted it on their website.
- Response to the survey only represents a small percentage of county boards and providers. There were 53 responses received (Council of Government – 1; County Boards – 38; providers – 14).
- Only two respondents included training materials that would qualify as modules to be reviewed. Other materials submitted were in the form of outlines, references to online or proprietary training, or just answers to the survey. Without a broader collection of training modules, best practice is difficult to determine.
  - 28 of the 53 respondents provided either training outlines or training materials.
  - 25 of the respondents only replied to survey questions.
  - 8 respondents provided outlines or materials (not necessarily training modules) that included topics that went above and beyond rule requirements
    - Allen County - Outline of the OACBDD SSA Training Module was provided. Content was not supplied and is available at a cost.
    - Bethesda Lutheran Communities - Outline of Leadership Management Training with outcomes identified, some checklists and news articles.
    - Abilities Resource Inc. referred to two training modules: Behavior Support training module (16 different modules); and Supervisory training modules (9 different modules). Content was not supplied. Costs for the modules are $11 and $9 respectively.

**Deliverable:** Report of the elements of existing training modules, using a variety of media tools for delivery, module gaps and description of future curriculum, which would serve as consistent, statewide curriculums promoting best practices of Service and Support Administration and Program Management in residential and day program settings.
- Lucas County - presentation slides on Medicaid training, meeting facilitation training, professionalism training, risk management training, and assessment training.
- Medina County: ISP-“How to” Guide booklet
- Muskingham County - training outline on Service Coordination Roles
- REM - training outline on Supervisor Training
- Wynn-Reeth - presentation slides, information sheets and checklists, on UI/MUI, Overview of DD, Plan Management/Implementation and documentation, Policies, and Consumer Health
- CRSI - Tasks list, Guidelines for Program Staff in Administration, Presentation slides on Home Manager Organization Training, forms, and presentation slides on a training done by Peggy Martin- “Working with Families”

  2 respondents provided what would be considered real training modules.
  - Clearwater COG - SSA basic curriculum that includes outline, slides, overheads and exercises; Person Centered Thinking training and Individual Budgets training slides and exercises. Also included a Best Practice Manuel.
  - Koinonia Homes - Presentation slides on Active Treatment and Skill Development, Waiver Funding System (slides, checklists, and forms), Home and Community-Based Waiver Services (presentation slides) and the new Manager training manual.

**Survey Responses:**

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<th>Question</th>
<th>Survey Response</th>
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| **Current case load size?** | SSA: Average = 30 to 35, unless the SSA has children, which is much higher  
PM: 8 to 28 residential; day service 21 to 50 – great variation depending on type of site, number living together, program type |
| **Specialized case loads?** | SSA: Specialization areas = waivers, nursing homes, offenders, children, MH, transition from school, congregate living and people living alone, adults  
20 of the 38 county boards indicated some specialization in case loads  
PM: Specialization areas = type of day program, licensed site or funding source. |
| **Educational**        | SSA: Most CBsDD require the SSA have a BA/BS degree –                                                                                       |
**requirements/experience?**  
- fewer use the SSA assistant  
- PM educational requirements vary  
- Two respondents reported that SSA job shadowing happens for 1 month.  
- PMs are often hired from within and have direct service experience.  
- Clinton County Board requires a new SSA to have 40 hours of on the job training with a residential provider (including nights).

**What training modules do you have to train SSA/PM?**  
- Typically followed what is required by rule for both SSA and PM  
- Some survey responses stood out:  
  - Clearwater COG: “Think About”, an “About Me” box, Jabbers Gifts and Giving (a game for self-advocates); Person Centered Planning and Individual Budgets; Person Centered Thinking  
  - Cuyahoga: SSA functions available on “infonet” (internal repository for information)  
  - Hamilton CB: Cultural Competency  
  - Lucas CB: Meeting facilitation; Professionalism; Managing Risk  
  - Renaissance House: Social Role Valorization  
  - Ross CB: Being Safe and Personal Awareness Class

**Is there training you consider best practice?**  
- Some survey responses stood out:  
  - Clark CB: Do the right thing training, Compfest training  
  - Clearwater COG: “Think About”, an “About Me” box, Jabbers Gifts and Giving (a game for self-advocates); Person Centered Planning and Individual Budgets; Person Centered Thinking  
  - Erie CB: Self-determination training that includes Person Centered Planning and Individual Budget training  
  - Grand Manor: DD offender program using relapse prevention model  
  - Hamilton: Expert Interviews; the mentor program; leadership development program; the Blue Ribbon Survey  
  - Holmes CB: Developing and understanding expressive and receptive communication  
  - Medina CB: How to write an ISP guide  
  - Muskingum CB: Service Coordinator’s role  
  - REM: Positive relationship building  
  - Richland CB: 16 hour training program in Person Centered Thinking and Planning

**Infrastructure in place to**  
- Support positions: clerical, fiscal, supervisory
**support SSA’s / PM’s?**

- Tables of organization listed
- Technology:
  - Smart phones;
  - Laptop computers;
  - Summit CB: Internet with guides to all functions of the job duties
  - Cuyahoga CB: Infonet (internal repository for information)

**How does communication occur across provider and county board systems?**

- Emails, phone calls, provider list serve
- Team meetings
- Monthly, bi-monthly or quarterly provider meetings
- Communication notebooks
- Through monitoring
- Home visits
- Problem solving meetings
- Provider trainings
- Provider representatives on key committees and projects
- Provider relation specialist

**Is training needed that you have been unable to obtain?**

- OEDI/COEDI, ODDP and AAI, provided regionally – cited frequently
- Leadership
- Team facilitation
- Positive confrontation
- Communication
- Negotiation techniques related to provider staffing schedule versus needs

**Themes:**

**Best Practice Training:** While suggested pockets of training are considered by the respondents as best practice, the overwhelming majority of the respondents train based on what is required in rule. This was true for both Service & Support Administration as well as Program Management. Comments from the collective, statewide focus group indicated that the majority of the required training dictated by rule is not relevant to the job of Service & Support Administration. Time could be better spent if training is more individualized and pertinent, addressing specific disabilities or specific training needs of those in the role of Service & Support Administration or Program Management.

It is clear that training is occurring, but it is not apparent that true training **modules** are being used. The majority of the respondents appear to use checklists, shadowing and conferences as their training tools.

Data collected from the focus groups was analyzed and coded. Training curricula did not rate as an important factor in the focus discussions although it did come up. Comments addressing a need for education totaled 29, which represents 3.8% of the total comments. No relationship was found between the focus groups representing best practice and the training information collected.
**Modes of training:** Modes of training varied from classroom training, on the job training, shadowing, modules available on computer, and 1:1 training.

**Mandated Training:** Rules dictating mandated training for Service & Support Administration heavily outweigh rules dictating training for Program Management. The certification and recertification processes for Service & Support Administration are several-tiered processes involving a review of transcripts to determine education level and the completion of classroom and ongoing training. The certification/recertification processes are managed at the state level by the Department of Developmental Disabilities.

In contrast, there is no certification process for Program Management. Mandated training specific to Program Management is limited to MUI/UI and Individual Rights training and 8 hours of ongoing training per year. Direct service staff must comply with additional requirements of First Aid/CPR and medication administration certification (when needed). Program Management staff would only need to comply with the additional requirements if they were serving in a direct service capacity. Education requirements are limited to a high school diploma although many agencies indicated that they require additional education or experience.

While the requirements differ greatly, it cannot be assumed that greater requirements under training and education equal better outcomes.

**Next Steps:**

- Due to the limited information provided, further collection and evaluation of materials needs to be completed. The issue of intellectual property has yet to be considered and needs to be discussed prior to sharing products statewide.
- Participants in the collective, statewide focus group on May 13, 2011, commented that the spreadsheet of survey responses was helpful in determining variations between counties and programs. It is recommended that this product/spreadsheet be distributed as a resource to county boards and provider agencies. Sally asked what this reference to a spreadsheet was about. Share as a resource.
- After additional information is received and evaluated, the creation of a resource library would be beneficial, including available on-line training.