

# Virtual Training Guide for Instructors

Tips. Ideas. Strategies.





# Thank You

First, we would like to start off by saying thank you! We are so proud of the CPI Instructor Community and how you've responded to the unique challenges facing us today. Working collaboratively with you to ensure the well-being of individuals across your organization is a privilege.

As social restrictions remain in place, CPI has taken some measures to help Certified Instructors continue to deliver training that maximizes staff competencies. Below are some opportunities to deliver training to existing Blue Card® holders, as well as support initial Blue Card confirmation while maintaining staff safety.

As a reminder, in order to qualify the class as a Blue Card training, you will need to meet CPI's Training Quality Standards including:

- Adherence to classroom delivery times as detailed in the Training Options section of your Instructor Guide.
- Use of authentic CPI instructional materials, such as Participant Workbooks or Job Aids.
- Inclusion of all required course content.
- Documentation and validation of Blue Card trainings.

# Training Delivery Options:

## For existing Blue Card holders

In accordance with best practices, CPI recommends that staff who have completed their initial training be formally re-trained within six months to a year. This may need to be done more frequently depending on required mandates for maintaining staff competencies as well as further skill development. It is vital that learners revisit the core values, concepts, principles, and models that act as the foundation for CPI training.

In addition to your traditional classroom delivery, you may now deliver training in one of two ways:

### 1. Blended (Online Module + Classroom) Learning

- a. Learners must complete assigned online modules.
- b. After online module completion, learner is required to participate in your live virtual Certified Instructor-led event using Skype, Zoom, or similar technology. These live virtual events are for reviewing content and assessing learners through activities, Q&As, case studies, and scenarios.

### 2. Virtual Classroom

- a. First, setup your live virtual Certified Instructor-led event using Skype, Zoom, or similar technology.
- b. During this event Certified Instructors deliver program content, and engage learners through activities, Q&As, as well as case studies, and scenarios.

# Training Delivery Options:

## For new Blue Card holders

### Considerations When Delivering Instructor-Led Virtual Classes

1. It is required that learners come with a Participant Workbook to all live virtual events to be able to record critical information.
2. Consider how you will administer the classroom test at the conclusion of training. Options include emailing responses, scanning copies, texting pictures, verbal assessments, or utilizing the chatroom.
3. Do your learners require training in physical interventions?
  - A. If physical intervention training is not required, Blue Card confirmations can be issued once the following criteria is met:
    - a. Learner attends and completes all components of a virtual training.
    - b. Certified Instructor finalizes the assessment of their engagement and competency.
    - c. Learner passes the classroom test.
  - B. If physical intervention training is required, Blue Card confirmations can be issued once the following criteria is met:
    - a. Learner attends and completes all components of a virtual training.
    - b. Certified Instructor finalizes the assessment of their engagement and competency.
    - c. Learner passes the classroom test.
    - d. Learner completes the in-class portion of training and competency in physical interventions.
      - In-person training must be scheduled to instruct and assess physical interventions.
      - This portion may be delivered at a later date that aligns better with your organization's schedule and training needs.
      - To aid in the delivery of the in-class portion, CPI has created physical demonstration videos. Please contact a Training Advisor to discuss effective use of these videos.
4. Review your organization's policies and procedures, mandates, legislation, and accreditation requirements to ensure you are in compliance with regulations.

# Training Delivery Options:

## Issuing Blue Card Credentials

In accordance with best practices, staff who are more likely to encounter conflict, requiring the use of restrictive physical interventions, should undertake Blue Card training. This training should be in compliance with organizational governance, policies and procedures, legal or regulatory standards, professional guidelines, and liability considerations related to preventing and managing conflict and crisis situations.

In addition to your traditional classroom delivery, below are suggestions on how to deliver Blue Card training to new staff while maintaining staff and learner safety:

1. Learners must complete assigned online modules to build their knowledge and understanding of the core concepts, principles, and mental models.
2. The application aspects of the training can be reviewed via an Instructor-led live virtual event, if classroom-based training has been suspended. However, teaching the physical interventions in a virtual classroom is not permitted for new learners. Seek specific guidance from your organization about how best to manage this.
3. In the interim, you may show CPI-approved videos and talk learners through the safety aspects of the physical interventions. This will help familiarize new staff with the range of interventions authorized and approved within your organization. It also provides them with a basic understanding of the risks involved in physical interventions, should they see or be asked to assist in an incident.
4. Once restrictions are lifted, CPI recommends that you host an in-person classroom-based training with learners. This will give them a practical opportunity to check their competence under your instruction. Videos accessed on the CPI website may be used to compliment in-person teaching to maximize safety.
5. If your organization requires you to provide in-person training for new staff, we suggest that your organization seeks direct guidance and advice from the relevant public health authority to ensure the occupational health and safety risks are safely managed.
6. CPI also advises delivering to smaller groups, so social distancing and appropriate control measures for good health and hygiene are maintained.

## I Preparing for Training:

1. Thoroughly plan your class logistics.
  - a. Determine class size that allows you to assess engagement, competency, and time for questions and answers but also meets your local and provincial guidelines. CPI recommends 10 or fewer during this time.
  - b. Determine the delivery platform that best meets your and the learner's needs.
  - c. Set expectations for schedule, communication plan, and class completion.
2. Deliver appropriate learning materials in advance.
  - a. If you are unable to do this, it is important to guide your learners on proper note taking, and how best to transfer them into learning materials.
  - b. Follow-up with an in-person training, once permitted.
3. Test your equipment and have your learners do the same.
  - a. Test internet connection, audio, video, and your ability to share the electronic presentation.
  - b. Learn the functions of your virtual delivery format.
4. Plan for any modifications to content delivery, creating interaction as you assess your learners.
  - a. While defined in general terms here, you'll still need to create and deliver a plan that is tailored to your specific needs. This may include adaptations to facilitation style, activities/role plays, assessments, and other interactions.

## Usage of Videos for Physical Interventions:

CPI has filmed Global Professional Instructors demonstrating all of the physical intervention skills. This is done to support you with flexible training solutions and to ensure the *Care, Welfare, Safety, and Security<sup>SM</sup>* of your staff members and the people in their care. It is the responsibility of each organization and Certified Instructor to ensure your staff have the necessary competencies to safely and effectively utilize physical intervention skills in their work environment.

1. Videos are accessible exclusively at [crisisprevention.com](https://crisisprevention.com) in the Instructor Resource section of 'My Account'.
2. These videos were designed to assist instructors with classroom model demonstrations. Each instructor must still facilitate practice of all necessary physical intervention skills in order to provide adequate skill development for the learners.
3. It is important to remember that taking learners through these videos is helpful in highlighting what physical interventions are authorized and approved in your organization and it enables you to talk through the application of the physiological principles and the associated risks.
4. The use of these videos does not allow learners to achieve competency. This must be done in person through the demonstration, supervision, and assessment by a Certified Instructor.
5. These videos are not intended for broadcast purposes, nor are they a substitute for live classroom training.



**REMEMBER:** The use of these videos does not allow learners to achieve competency. This must be done in person through the demonstration, supervision, and assessment by a Certified Instructor.

## I Delivering Content:

It is essential that Certified Instructors present training materials clearly and efficiently for the learner.

1. Consider the duration of your training.
  - a. Foster learner engagement by breaking training into 2-4-hour timeframes.
  - b. Incorporate movement, creating variability in the learning experience.
  - c. Take short breaks every 60-90 minutes.
2. Require learners to have their camera on so that you can confirm their attendance and assess their interest level.
3. Have alternate ways to display notes, normally captured on a flip chart.
4. Account for learning barriers, such as any known language or learning difficulties, helping learners capture and retain the information presented.
5. Develop rapport early. Plan an enthusiastic introduction and icebreaker to learn something about each learner. This will set the tone for the class and promote engagement throughout the training experience.
6. Adjusting some of the activities in your Instructor Guide is essential.
  - a. If you aren't able to facilitate role play, try some "What would you do?" scenarios. Have learners visualize situations, reflect on approaches, and discuss how various course content is relevant.
  - b. You could also develop a case study that applies to your environment and can be referenced throughout the training.

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## I Assessing Your Learners:

By signing off on an employee's Blue Card, you are confirming that the learner has displayed competency in the skills required to safely and efficiently manage crisis situations. It is the responsibility of Certified Instructors to assess each learner throughout the training. Don't be afraid to require follow-up sessions with individuals not meeting expectations.

- Establish Safe Participation Guidelines and successful completion expectations. Let your class know exactly what is expected of them and develop the metrics for measuring success. Observe who is taking notes and participating, monitor the chat room, promote and value the program philosophy of *Care, Welfare, Safety, and Security*<sup>SM</sup>. This is where having a moderator can really help.
- Make sure each learner has multiple opportunities to contribute. Keep track of who has contributed and adjust your strategy accordingly.
- Administer the classroom test in a manner that is consistent with your organizational standards and record keeping requirements. If the learners have workbooks, which is the ideal training plan, you must have a way to retrieve the classroom test and issue Blue Card confirmations. You can have learners scan copies, send photos, or use an app to send pictures as PDFs.



## | After the Class:

Remember, training isn't a one-and-done experience. Ongoing skill reinforcement is essential. Learners need to regularly review content and practice the skills in order to best be prepared.

1. Complete follow-up assessments in a timely manner, providing the learner with the direction they need to ensure retention. Assign reflection questions, hold one-on-one discussions, conduct scenario-based assessments, etc. Remember, each learner is unique, so tailor your approach accordingly.
2. Review the experience, making any necessary adjustments for your next training. For many, this will be the first time training virtually. It's okay if things don't go exactly as planned. In fact, they probably won't. Determine what worked, where there is room for improvement, and how to best make adjustments.
3. Follow up with your learners to reinforce learning objectives. You could email them the three approaches to limit setting. Ask them to tell you the three Precipitating Factors they've observed, and how they influenced the behavior of a person in crisis. You can also share free CPI resources that support skill reinforcement, such as blogs and eBooks, and make sure they sign up to receive the *Beyond the Blue Card*™ eNewsletter.
4. If you are going to teach physical intervention skills at a later date, remind participants to bring their workbooks and make sure you allow time for a thorough review and follow-up assessment. Remind your learners that these skills should only be used after all other options are exhausted.

All of us at CPI want to thank you for your commitment to the *Care, Welfare, Safety, and Security* of those in your care. If you have any questions or concerns, don't hesitate to call your CPI Instructor Standards and Support Team at 877.877.5390. And don't forget that you can join and start a conversation online in the CPI Instructor Community.

Sincerely,

CPI Instructor Standards and Support Team