COMPANION GUIDE[1]

Introduction

As an Older Adult Behavioral Health Specialist, you have a special role in providing training, coaching and technical assistance to providers in your community that will improve their ability to address the behavioral health needs of older and disabled adults. The modules in the *Building Partnerships for Older Adult Behavioral Health* training series are a primary resource to help you plan, organize, and provide training sessions for your community partners.

Ensuring that the people who care for older adults and people with disabilities can provide appropriate behavioral health services is an important component of building capacity at the local level. In addition to increasing the knowledge levels of direct service staff, training sessions can provide opportunities for:

- Improving communication between aging services and behavioral health providers;
- Providing a common understanding of the many and complex issues facing older adults; and
- Laying the groundwork for community problem-solving to address gaps in services or problem areas.

This section of the Companion Guide provides general guidance for planning and organizing training sessions. There are also sections for each module. There you will find more specific guidance for using a module to educate and inform direct service staff, along with discussion questions and additional resources related to the module's content.

Planning

Consider whether **cross-training, or a joint session** between Mental Health and Aging Services staff, can improve communication and coordination of services.

> In addition to increasing knowledge, cross-training can be a very effective way for staff who work in different agencies to get to know each other, understand the service challenges other agencies face, and do some joint problem solving.

Consider your **topic, or the module** that you want to present.

> Do your homework and review the module ahead of time. You don't have to know absolutely everything about the module's topic, but you do need to understand it well enough so that you can help participants relate it to their jobs and the people they work with.

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[1] Portions of this material were adapted from *KU Work Group for Community Health and Development*. (2015). Chapter 12. Providing Training and Technical Assistance. Lawrence, KS: University of Kansas. Retrieved May 21, 2015, from the Community Tool Box:

Consider whether your training would be more effective if you had a **co-presenter**.

> Including one of your community partners as a co-presenter can lend credibility to the training, especially if you plan to do a cross-training session. A co-presenter can also provide a "change of pace" for participants if you plan to do a session that lasts 3 hours or more.

Consider your **audience**.

> Understanding the participants' training needs will do more than anything else to help you decide how to present a module's content. Some things to think about are:

- What do they already know?

- Is this material out of their field?

- Do they know one another and/or work together?

- Will they come in with a particular attitude toward the training?
    - Are you offering material that will contradict what they think they know is true?
    - Are you introducing a new concept that conflicts with what they've already been doing or with their previous training?

- Under what circumstances are they attending this training?
    - Do they know about the Senior Behavioral Health Investment and what you're trying to accomplish?
    - Will they be told to attend or given a choice?
    - Are they coming on paid time or not?

Consider the **time available** for the training.

- The modules are designed to fit within a 45–90-minute time frame. This will allow you to show the module DVD and have a short follow-up discussion. Note that 90 minutes are required for each module (DVD and discussion). Each module is approximately one hour and to get CEU for a module, a participant must watch it in its entirety.

- In a medium-length session of 90 minutes to 3 hours, you can view more than one module video and discuss concepts or issues in some depth.

- In a longer session of over 3 hours, you can present modules in depth, have longer discussions, and conduct a few activities. You also need to factor in time for breaks, beverages, snacks, or even a meal.

Consider the "**business case**" for agency administrators, manager or supervisors.

> You will need to present a good rationale to justify release time for staff to attend, backfilling if necessary, and possibly reimbursement for travel or meals. Some possible approaches:

- Include staff training in the partnership agreement between your organization and theirs.

- Take the training to their community.

- Provide the training during a scheduled in-service.

Consider **Continuing Education Units**.

- This program has been approved for eight units of clinical CEUs from the Oregon Chapter of the National Association of Social Workers (NASW) through May 2016.

- Each module is worth one unit of CEU.

- You will act as proctor. Each participant needs to sign in on roster and to fill out an evaluation form each time they view a module for CU credit. These forms, and a completion certificate, have been included in this packet. As proctor, you provide trainees with a certificate of completion for each module/unit and mail the roster and evaluation form(s) back to the Oregon Chapter of the National Association of Social Workers, 2929 SW Multnomah Blvd., Ste. 204, Portland, Oregon 97219. (This address is on the forms as well.)

- Forms (sign-in roster, evaluation, and certificate) are located in the final section of this Companion Guide.

Physical Space and Logistics

Know the space you'll be using for the training session.

- Is it accessible?
- What is parking like?
- How is the lighting? Ventilation?
- Is it large enough to accommodate the participants?
- What kind of seating is available?
- Are there enough outlets, phone jacks, etc., to support your equipment needs?
- Can you provide beverages? Snacks?

Implementation

By the time a training session begins, participants often have a strong inkling about whether or not they're going to find it worthwhile. Here are some ways you can set a positive tone:

- Set up the room so that people can face one another and there's no obvious "position of authority."

- Take time for introductions, especially if people from different agencies are attending.

- Provide a context for the session—e.g., describe your position, the goals of the Senior Behavioral Health Investment, how this training can improve their effectiveness with clients, etc.

- Provide an overview of your agenda or plan for the session.

Each module includes discussion questions that can generate valuable information for you to use in your capacity-building work. Here are some facilitation tips:

- Listen closely to understand the points a speaker is making, and restate them aloud if you are unsure.

- Stay in your role as trainer. You probably have your own opinions about the topic under discussion, but if you offer them, you may alienate participants who have a different point of view.

- Consider having a "parking lot" for concerns or issues raised by participants that are beyond the group's ability to resolve. A flip chart or sticky notes are helpful for this.

- Encourage participation from everyone. Try to draw everyone in and not let just a few people dominate the discussion.

- Don't be defensive if people disagree with or challenge the material you've presented. They need time to digest it.

Ending the training session on a positive note is as important as the introduction. Here are some ways to close the session effectively:

- Give participants a chance to sum up, or reflect on how they might use the information on the job.

- Let participants know how you will use the information that came from the group discussions, especially if it highlighted areas where the local older adult behavioral health system can be improved.

- Make sure participants have time to complete the Evaluation Form (provided by the Institute on Aging). You may send completed forms to the Institute on Aging to compile results. The address is printed on the form at the bottom of the form.

Module Overview

The topics and format used for these modules emerged from interviews with key stakeholders and content experts. This included those interviewed for the report to the Senior Mental Health Budget Note Committee of the Oregon Legislature (White et al., 2014). Based on those interviews, additional content experts were identified and interviewed. A work group comprising professionals from multiple disciplines and work experiences was convened and provided specific guidance related to the content and delivery of eight modules (see following pages).

Building Partnerships for Older Adult Behavioral Health—Training Modules

Module	Purpose	Content Summary
1. The Everyday Experience of Aging	It is important for service providers to understand that the vast majority of older adults enjoy good mental health and adapt well to age-related changes. This module provides information on aging as experienced by most older adults.	The module features interviews with a diverse group of older adults who vary in age, gender, life experiences, sexual orientation, income and living situations, and physical abilities. Information presented includes the vital role of older adults in their families and communities, age-related changes and how older adults adapt to those changes, and ways they optimize mental health in the face of physical and social challenges are highlighted.
2. Behavioral Health Partners in Older Adult Behavioral Health	This module targets those who do not work in behavioral health. Knowledge about the behavioral health system will facilitate interagency partnerships to optimize services for older adults. Behavioral health providers who participate in this training can provide specific information about behavioral health services in your community.	This module describes behavioral health needs in older adults, how the behavioral health services system works in Oregon, how to access services, and the role of Older Adult Behavioral Health Specialists in bridging service gaps.
3. Aging Services Partners in Older Adult Behavioral Health	This module targets those who do not work in aging services. Knowledge about aging services will facilitate interagency partnerships to optimize services for older adults. Aging services providers who participate in this training can provide specific information about aging services in your community.	This module describes aging services needs of older adults, how aging services works in Oregon, how to access services, and the role of community aging services providers in bridging service gaps.
4. What's Happening with Gladys?	This is one of four modules that focus on clinical issues in which behavioral health needs of older adults can be challenging and require professionals to work across agencies and disciplines. This module focuses on anxiety and fear of falling.	Actors portray Gladys, who has a history of anxiety, and the Client Services Coordinator of the Meals program. General information is presented on anxiety and falls, including prevalence, symptoms, screening and assessment, and treatment and interventions. Multidisciplinary team members individually and collectively describe their approaches to working with someone like Gladys, modeling best practices and identifying community resources.

Module	Purpose	Content Summary
5. Bill's Search for Lois	This clinical module focuses on clinical issues related to Parkinson's disease and dementia. It demonstrates the challenges of medical management of Parkinson's disease symptoms and understanding behaviors associated with the dementia that often accompanies the disease.	Actors portray Bill, who is looking for his wife, Lois, and Bill's son who is trying to keep his father from losing his place in an Adult Foster Home because of his behaviors. General information is presented on Parkinson's disease and the unique features of dementia associated with Parkinson's disease. Information includes prevalence, symptoms, screening and assessment, and treatment and interventions. Multidisciplinary team members individually and collectively describe their approaches to working with someone like Bill, modeling best practices and identifying community resources.
6. Has Anyone Seen George?	This clinical module focuses on issues of isolation, depression, grief, substance abuse, and suicidal behavior. It demonstrates the challenges of identifying individuals at risk and connecting individuals to services.	Actors portray George, a life-long single farmer who can no longer manage his farm as he used to and is grieving the loss of his dog, and the Sheriff who is the community gatekeeper alerting the service system to George's situation. General information is presented about depression and suicide, substance abuse and suicide, and grief and depression. Information includes prevalence, symptoms, screening and assessment, and treatment and interventions. Multidisciplinary team members individually and collectively describe their approaches to working with someone like George, modeling best practices and identifying community resources.
7. We Have Another Call About Nell!	This clinical module focuses on a middle-aged woman with schizophrenia whose diabetes is poorly controlled. Diabetes is a result of the antipsychotic medications she has been on for many years. People with severe mental illness often experience accelerated aging. This module demonstrates the difficulty of finding and maintaining services for someone with a severe mental illness.	Actors portray Nell, a person with schizophrenia who is experiencing a psychotic episode, and the nurse who cares for her in the emergency department. General information is presented on schizophrenia and co-occurring disorders. Information includes prevalence, symptoms, screening and assessment, and treatment and interventions. Multidisciplinary team members individually and collectively describe their approaches to working with someone like Nell, modeling best practices and identifying community resources.
8. Behavioral Health Issues and Advance Care Planning	Advance care planning and providing end-of-life care can be especially challenging when behavioral health issues are involved. This module presents information on advance care planning with this population mind.	Information about assigning health care representatives, making wishes known, and use of resources such as the Physician Orders for Life Sustaining Treatment are presented, using examples from the clinical modules (4–7) in this series.