

Certified peer counselor trainer mentor handbook



Behavioral Health and Recovery
Peer Support Program

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Washington State
Health Care Authority

HCA 82-0439 (04/24)

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In November 2018, Washington Health Care Authority Division of Behavioral Health and Recovery (DBHR) staff and Certified Peer Counselor (CPC) trainers from community-based and other organizations met to discuss trainings, their unique values, performing trainer assessments/evaluations, and mentoring of new trainers. This meeting led to the development of an agreed upon set of values and adopting mentoring of trainers as a method of ensuring the continued quality and effectiveness of CPC and continuing education trainings. Part of this work resulted in this handbook acknowledging the foundations of peer support and generating a practical method to insure its continual success through mentoring diverse generations of peers training peers.

Peer support: a national view

Foundational values of peer support

Before we look at the framework and details of mentoring, we will briefly review the foundations of our work. The foundational values of peer support are expressed in differing ways and can be summarized as follows:

- Empowerment and Responsibility;
- Choice or Self-determination;
- Acceptance and Respect for Diversity;
- Reciprocity and Mutuality in Relationships;
- Social Action; and
- Recovery

Recovery takes on many forms and each person is responsible for defining their recovery. The Substance Abuse and Mental Health Services Administration (SAMHSA) defines recovery as “a process of change through which individuals improve their health and wellness, live a self-directed life, and strive to reach their full potential.” (SAMHSA 2011) SAMHSA goes on to identify 4 supportive dimensions of recovery (health, home, community, purpose) and its 10 guiding principles:

- Recovery emerges from hope
- Recovery is person-driven
- Recovery occurs via many pathways
- Recovery is holistic
- Recovery is supported by peers and allies
- Recovery is supported through relationship and social networks
- Recovery is culturally-based and influenced
- Recovery is supported by addressing trauma
- Recovery involves individual, family, and community strengths and responsibility
- Recovery is based on respect

SAMHSA core competencies for peer

worker in behavioral health services

Core Competencies for peer workers reflect certain foundational principles identified by members of the mental health consumer and substance use disorder recovery communities. These are:

- **Recovery-oriented:** Peer workers hold out hope to those they serve, partnering with them to envision and achieve a meaningful and purposeful life. Peer workers help those they serve identify and build on strengths and empower them to choose for themselves, recognizing that there are multiple pathways to recovery.
- **Person-centered:** Peer recovery support services are always directed by the person participating in services. Peer recovery support is personalized to align with the specific hopes, goals, and preferences of the individual served and to respond to specific needs the individuals has identified to the peer worker.
- **Voluntary:** Peer workers are partners or consultants to those they serve. They do not dictate the types of services provided or the elements of recovery plans that will guide their work with peers. Participation in peer recovery support services is always contingent on peer choice.
- **Relationship-focused:** The relationship between the peer worker and the peer is the foundation on which peer recovery support services and support are provided. The relationship between the peer worker and peer is respectful, trusting, empathetic, collaborative, and mutual.
- **Trauma-informed:** Peer recovery support utilizes a strengths-based framework that emphasizes physical, psychological, and emotional safety and creates opportunities for survivors to rebuild a sense of control and empowerment.

SAMHSA 12 competency categories

1. Engages peers in collaborative and caring relationships
2. Provides support
3. Shares lived experiences of recovery
4. Personalizes peer support
5. Supports recovery planning
6. Links to resources, services, and supports
7. Provides information about skills related to health, wellness, and recovery
8. Helps peers to manage crises
9. Values communication
10. Supports collaboration and teamwork
11. Promotes leadership and advocacy
12. Promotes growth and development

Peer support: a Washington view

Peer support has evolved from its informal beginnings to some of its more formal and current expressions. Washington State introduced peer support into the mainstream of community behavioral health services in 2005 when peer support for mental health became a service modality for Washington State Medicaid Benefits; since that time, Washington has been training and certifying Certified Peer Counselors (CPC). In following years, the Department of Behavioral Health and Recovery (DBHR) added continuing education courses to strengthen peer support services. DBHR is expanding peer support to include services, and certification for peers having personal experiences with addictions and recovery.

Peers now work in multiple types of services with expanding opportunities and this puts a demand on developing a diverse and expanding group of experienced trainers.

Certified peer counselor training

The Washington Certified Peer Counselor training program:

- Prepares peers to work as peer counselors and supporters;
- Meets basic training needs for varied types of peers; and
- Enhances and insures peer workforce development. (From Draft Peer Support Training & Certification Program Guidelines, 2018)

Initially, the trainings were offered 5-6 times a year for adults, family and youth. The current and expected future demand for more CPCs has increased the need for trainings and trainers with diversity of peer support and cultural experiences. To meet this need, DBHR and community-based organizations are seeking to increase the number of trainers and keep the trainings consistent in content and quality.

The training curriculum adopted in 2005 underwent a few updates before being retired in 2016 and replaced with a new curriculum. On a parallel track, the Youth and Family training curriculum was developed in 2012 and put into use in 2013 and with updates continues to be used in 2019. At present, there is an effort to incorporate the Youth and Family materials along with substance-use recovery materials into the newest version of the Adult CPC manual creating a unified curriculum.

DBHR and CPC trainers are committed to maintaining the quality and integrity of CPC trainings, especially during health systems changes and expansion of the workforce. Due to the amazing efforts

of many individuals and organizations, CPC and other peer support services in Washington are poised for further development. It is imperative to continue building on the established foundation a supportive framework so the work can continue.

CPC training values

Values meet four elements critical to ensuring quality of CPC trainings and expectations of trainers:

1. Values lead to behaviors in the CPC training that represent a peer supporter;
2. Behaviors become the culture for the training and can continue into the workforce;
3. Culture forms our training and peer supporter community; and
4. Values allows for a variety of individual strengths and training styles.

In 2018, more than 25 CPC trainers engaged in discussions and activities to identify values that are built on the foundational values of peer support and represent our collective and unique expression of those in CPC trainings. The following are the seven values CPC trainers are responsible for upholding:

- **Inspiring hope:** Recognizing potential in everyone through modeling recovery in ourselves.
- **Empowering:** Honoring individual's voice and choice using shared power.
- **Strengths-based:** Draws on the potential and possibilities in every person to continue the individual building process; reframing storms into treasures.
- **Culturally responsive:** Creating a safe environment through respecting diverse perspectives, being observant, creative, and knowledgeable.
- **Authenticity:** Modeling peer support in an honest, inclusive, and trauma-informed way.
- **Responsibility:** Being accountable to self and others through procedural practices and personal development.
- **Story's power:** Realizing through language and action recovery and resiliency's strengths and pathways.

CPC Trainers are responsible for upholding these values, and the assessing of the quality of their training are viewed in part through the lens of these values. Values play an important role for developing peer training and the emerging workforce.

Mentoring

Training is a major component of the growth and it will be useful to implement a practical resource that grows with the demand, CPC trainer mentoring.

A proven approach

There are many ways to develop new and continually improving CPC trainers and one of the oldest methods is on-the-job training or mentoring. Historically, you will find origins pointing back as far as Homer's *Odyssey*, approximately 10,000 years ago. A more recent and popular example from American cinema, *Yoda the Jedi Master* said to a young Luke Skywalker, "pass on what you have learned."

Most skills development occurs during hands-on learning opportunities. Many of us have experienced some form of mentoring when someone we look to for guidance passes on practical skills and wisdom. As a training mentor, you are vital to insuring that our next generation of trainers maintain skills level, peer ethics, and professionalism. As a training trainee, you have the opportunity to gain practical skills and insights continuing the tradition of developing a strong peer workforce.



Mentoring is not training. Training is a onetime structured process conducted in a controlled environment to provide the trainee with knowledge and skills to perform a job's tasks.

Mentoring is ongoing guidance designed to support trainees gaining skills required to perform their job, in this case as trainers.

In our case, the goal of mentoring is to pass what you have learned so to develop new and diverse CPC trainers that uphold the foundational values of peer support. Mentoring has proven repeatedly to be a powerful and effective tool for passing on to diverse and new generations needed skills building, knowledge sharing and values. Formally initiating and implementing a structured CPC trainer mentoring approach will provide mentors and trainees effective tools to be successful in achieving the goal.

Roles of a Mentor

Which role is right for the mentor depends on the mentor's abilities and the trainee's needs. The mentor and trainee will need to determine which relationship fits. Some roles may not start as planned but, through subtle actions, the relationship between the mentor and the trainee may evolve over time. At times, mentors may not even be aware they are performing these roles.

- **Teacher:** This role requires the mentor to share experiences as a seasoned professional. First, however, the mentor needs to be aware of the skills needed to perform job tasks successfully. It is important to share lessons learned from past mistakes to strengthen the mentor and trainee relationship. The teaching role also requires mentors to step back and understand that the trainee is just beginning the learning process. Sometimes, veteran professionals know their work so well that they tend to assume that trainees already have some basic understanding of the job. Mentors need to be able to see the job as the trainee does and remember how difficult it was to learn new skills.
- **Guide:** As a guide, the mentor helps the trainee to navigate through the job and the inner workings of trainings. The "behind the scenes" or shop politics are not always obvious to an outsider. The mentor should explain the "unwritten workshop rules" so that the trainee can become aware of the environment. This includes knowledge of special training procedures that are not always documented. It could also include policies under consideration.
- **Counselor:** The role of counselor requires the mentor to have a trusting and open relationship with the trainee. The mentor needs to stress confidentiality and show respect for the trainee. Mentors can promote confidentiality by not disclosing personal information. It is another way to show respect.
- **Advisor:** This role requires the mentor to support the trainee develop professional interests and set realistic career goals. As an advisor, the mentor talks to the trainee about what they want to learn and sets career goals. Keep in mind that the process of setting goals must be flexible enough to accommodate changes in the environment.
- **Motivator:** Motivating the trainee is a difficult yet essential mentor role. Motivation can be learned but is typically a natural inner drive that compels a person to be positive and succeed. Mentors can motivate trainees to succeed through encouragement, support, and incentives. They can

also motivate trainees by showing them support.

- **Door opener:** In the role of door opener, the mentor helps the trainee establish a network of contacts within the training establishment. This gives trainees a chance to meet other people for professional, as well as, social development. As a door opener, mentors introduce trainees to their own contacts to help build the trainee's own network structure.
- **Coach:** The role of coach helps the trainee to overcome difficult and challenging assignments. Coaching is a complex and extensive process, not an easy skill to perform. Specifically, coaching involves feedback. This is best done while the trainee performs work tasks and the mentor looks on, giving positive and constructive feedback as the situation demands. Good mentors will not provide feedback when they do not know much about the subject or circumstances. It is not appropriate to criticize the trainee in the presence of others. Some coaching is best when it is done in private. No one likes it when their faults or weaknesses are pointed out in public.
- **Role model:** As a role model, the mentor sets an example of the values, ethics, and professional practices of the work place. Most trainees, in time, imitate their mentors. Therefore, a mentor must have high standards of professionalism, solid work ethics, and a positive attitude. A mentor must exhibit the positive qualities of an experienced professional.

objectives and benchmarks at the outset and review them frequently as they may change over time.

- **Communicate and respect your partner's time:** No relationship can succeed without clear communication. Show respect for your partner's time by confirming meetings beforehand and always letting your partner know if you are running late or need to reschedule. Trainees should anticipate what they would like to discuss in advance of each meeting.
- **Keep an open mind:** Both parties need to be willing to be open and exchange information. Remain open-minded and flexible as your relationship evolves.
- **Take ownership of your career development:** While Mentors may support Trainees developing the necessary tools for success, Trainees must remember that it is up to them to implement these tools. Trainees will need to put in the time and effort required to advance toward achieving their career goals. It is important to keep in mind that success will not come immediately. And while the Mentor can be a valued guide, responsibility for the Trainee's success always belongs to the Trainee.
- **Be aware of differences:** Be sensitive to cross-race/cross-gender relationships, different social and educational backgrounds, and different career experiences.

Foundation for a successful mentorship

The most effective mentoring relationships are based on a foundation of trust and confidence, where the trainee feels safe to openly share their goals, objectives, and concerns. While every mentoring relationship is different, the following general guidelines are essential for success:

- **Have realistic expectations:** Both parties should understand and agree on their expectations for the partnership. Self-awareness is important, and both the Mentor and Trainee should identify what they would like to gain from the program and what they are able to deliver. Articulate these desires to each other and determine realistic goals.
- **Share responsibility for the relationship:** Both the Mentor and Trainee need to take ownership of the relationship. Neither should assume it is the other's sole responsibility for arranging meetings. Significant energy and time is required of both parties to create a successful mentorship.
- **Establish concrete goals and develop an action plan:** The mentorship should be focused on learning and development with clearly stated goals. Set

Effective communication

There are various ways to communicate with one another including email, text, audio or video conversations, or meeting in person. When in-person interaction is not possible due to distance and time, we strongly encourage you to consider using the online communication mechanisms that are readily available.

Of course, communication is a two way process that includes just about any type of interaction with another person, from subtle to overt. Poor communication can leave us feeling frustrated or worried.

The ability to express oneself in person or on the phone offers more tools to convey meaning. Many of the social cues we have learned are absent in writing, written communication is a skill and an art. Of course, we should always be considering generational and cultural differences. The better people can express themselves, the deeper the trust and effectiveness of the mentoring relationship.

Work to improve your communication with one another by being expressly clear about what works and what does not.

Setting goals

It is important to set concrete goals. It is encouraged that Trainees take charge of setting pace and direction, and explore with the Mentor how they may support them attaining their goals. Setting goals and working with others to do so increases accountability and investment in the process.

The CPC training has used SMART method as a tool for setting goals and we recommend it be used for the Mentor/Trainee relationship. We refer you to your CPC Training Manual for a reminder if needed.

If the Trainee is having trouble setting goals, discuss Peer Support and CPC Training values with them. Clear values can help make the choices easier and the outcomes more meaningful.

Other tactics may include asking questions what do they think success looks like, who or what trainers inspire them, what is their ideal outcome, or how do they want to make an impact in training others?

Mentors, it will be you who keeps Trainees on track to reaching their goals, or supports them in adjusting their goals and timelines.

Good to know

Consider the following when communicating through writing so you might prevent miscommunication:

Meaningful subject line: A good subject line ensures that the recipient(s) understands the importance of your message. It also acts as a summary or provides a clear idea of the topic to be discussed.

Clear and concise messages: Take the time to write clear, concise messages. If you receive messages that are not clear and concise, take time to get clarification.

Investigating assumptions: What assumptions have been made, whether stated explicitly or not? To uncover assumptions or prevent misinterpretations, state your understanding of the message or ask for clarity.

Communicating about communication: It is very important to inform one another of your schedule in advance. This prevents unnecessary frustration of a communication breakdown.

Washington CPC trainer mentor & trainee qualities/responsibilities

Qualities and expectations of a CPC training mentor

A mentor is a CPC, experienced trainer, effective communicator, professional role model, peer coach, and a developer of talent.

1. Mentors embody the values of peer support and CPC trainings.
2. Mentors should have a minimum experience of two years or 10 trainings using an established curriculum and having positive evaluations as a trainer.
3. Mentors should be approved by DBHR Peer Support Manager.
4. Mentors facilitate personal and professional growth in an individual by sharing knowledge learned throughout the years.
5. Mentors demonstrate how to do the job of training.
6. Mentors show a trainee how best to learn a process for getting the job done.
7. Mentors have good communication skills for presenting information clearly and consistently, demonstrating active listening skills, and providing timely and effective feedback.
8. Mentors exhibit patience, tolerate mistakes, and repeat information as needed.
9. Mentors have a sense of humor that includes the ability to laugh off some of the things that go wrong, saying that it's OK when someone makes a mistake, and remembering that mistakes in training are not the end of the world.
10. Mentors have a desire to support people learning, are sincere and honest.
11. Mentors should exemplify a passion for training and learning.
12. Mentors demonstrate good work habits, role model expected behaviors, offer strengths-based praise for successes and attempts at success, provide assistance, and support trainees before they are unsuccessful on their own.
13. Mentors are trustworthy and respectful.
14. Mentors must demonstrate continued professional growth and participate in DBHR sponsored Training with Trainers (annual summit or one day workshops).
15. Mentors are to maintain positive training evaluations.
16. Mentors are expected to demonstrate knowledge of curriculum objectives, instructional strategies, skills checks, and classroom management.

Mentor responsibilities

In addition to responsibilities listed below, a mentor should review regularly the roles, qualities and expectations, and the foundations for successful mentorship in this handbook.

- Time commitment
 - Mentors should meet with their Trainees for at least one hour prior to a training and one hour post training by phone, video-conferencing, or in person.
 - Using emails or text between meetings to stay in touch may be helpful when both parties agree to the best method.
 - Commit to being engaged and accessible to your Trainee.
 - Mentors should be available to have Trainee “shadow” you when preparing or training.
 - Mentors, or surrogates if an agency, should be present when Trainees are training.
 - It may be helpful to keep track or log time spent supporting Trainee.
- Track and document necessary components of Mentor/Trainee Agreement, Outcome Assessment, Registry of Trainers Entry.
 - The Mentor/Trainee Agreement will document Trainee SMART Goals and Mentors commitments; it is a record of expectations.
 - The Trainee Outcome Assessment is a record of progress toward readiness for entry on the Registry of Trainers.
 - Mentors support completion of trainee process moving Trainee to Registry of Trainers.
- Support, guide, encourage, and assist the Trainee in professional development.
 - Observe the Trainee and provide reflection and feedback on presented topics.
 - Listen to the needs and expectations of the Trainee and offer advice and guidance.
 - Support clarifying the Trainees goals and aspirations.
 - Challenge by asking thoughtful questions.
 - Don't be afraid to encourage them to explore new ideas or try new things.
 - Honestly offer your opinion while respecting the Trainee.
 - Be willing to share your experiences and resources.

All registered CPC Trainers and trainees are expected to attend a minimum of one of the trainers training events throughout the year.

Qualities and expectations of an CPC training trainee

A training Trainee is a CPC, desires to train CPCs, effective communicator, passion for peer work, coachable, and an underdeveloped talent.

1. Trainees embrace the values of peer support and CPC trainings.
2. Trainees should have a minimum experience of one year as a CPC working in peer support roles, or one year's experience providing recovery supports to individuals through a program.
3. Trainees should be acknowledged by DBHR Peer Support Manager before engaging in the CPC Mentoring Process.
4. Trainees commit to personal and professional growth.
5. Trainees desire to know and perform the job of training.
6. Trainees learn from mentors a process for getting the job done.
7. Trainees have the building blocks of good communication skills for presenting information clearly and consistently, demonstrating active listening skills, and providing timely and effective feedback.
8. Trainees exhibit patience, tolerate mistakes, and repeat information as needed.
9. Trainees have a sense of humor that includes the ability to laugh off some of the things that go wrong, being OK when someone makes a mistake, and remembering that mistakes in training are not the end of the world.
10. Trainees have a desire to support people learning, are sincere and honest.
11. Trainees should exemplify a passion for training and learning.
12. Trainees develop good work habits, model expected behaviors, offer and receive strengths-based praise for successes and attempts at success, accept assistance and support before they are unsuccessful on their own.
13. Trainees are trustworthy and respectful.
14. Trainees must demonstrate continued professional growth and participate in DBHR sponsored Training with Trainers (annual summit or one day workshops) until completing all related goals.
15. Trainees are to maintain positive training evaluations.
16. Trainees are expected to demonstrate knowledge of curriculum objectives, instructional strategies,

skills checks, and classroom management as a part of the CPC Mentoring Process.

Trainee responsibilities

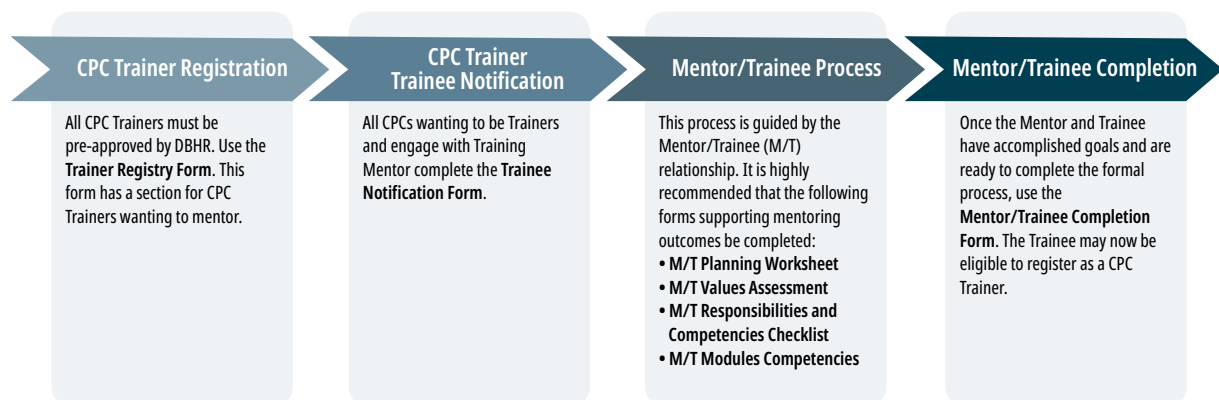
In addition to responsibilities listed below, a trainee should regularly review the qualities and expectations, and the foundations for successful mentorship in this handbook.

- Time commitment
 - Trainees should meet with their Mentors at least one hour prior to a training and one hour post training by phone, video-conferencing, or in person.
 - Using emails or text between meetings to stay in touch may be helpful when both parties agree to the best method.
 - Commit to being engaged and accessible to your Mentor.
 - Trainees should "shadow" or observe their Mentor or other CPC Trainer when preparing for a training.
 - It may be helpful to keep track or log time spent as a Trainee.
- Track and document necessary components of Mentor/Trainee Agreement, Outcome Assessment, Registry of Trainers Entry.
 - The Mentor/Trainee Agreement will document Trainee SMART Goals and Mentors commitments; it is a record of expectations.
 - The Trainee Outcome Assessment is a record of progress toward readiness for entry on the Registry of Trainers.
 - Mentors support Trainee completion of application to Registry of Trainers.
- Invest in professional development as a CPC trainer.
 - Initiate contact with Mentor or agency from Registry of Trainers to request mentoring.
 - Be respectful of Mentor's time and respect commitments.
 - Seek support from Mentor as needed.
 - Collaborate and reflect with Mentor.
 - Be open to constructive feedback from Mentor.
 - Commit to the mentoring process until completion.
 - Exhibit a genuine curiosity as a trainer.
 - Train with other trainers and facilitate training module(s) as a solo trainer.

All registered CPC Trainers and trainees are expected to attend a minimum of one of the trainers training events throughout the year.

Washington CPC mentoring process

The CPC Mentoring Process is a combination of adapting common mentoring/trainee practices with desired goals and outcomes of DBHR and the peer training community. The process is to support emerging trainers and ensure the quality of CPC trainings—quality based on training skills, strengths development, and accepted peer support values and recovery.



CPC trainer registry

As it stands now, all individuals training are to have submitted a brief biography to DBHR outlining their qualifications to train. This process has worked intermittently and will improve with implementation of the CPC Mentoring Process as there will be a form on file of all registered CPC instructors and organizations.

All current CPC trainers and training agencies will complete a DBHR form for Trainers Registry (Attachment A).

- All trainers eligible to provide CPC instruction without direct oversight will be registered with DBHR and the registry will be a public record of individuals and agencies that are DBHR approved for CPC trainings.
- The Trainer Registry Form can be updated as needed and is the primary tool for keeping DBHR informed of a trainer's status.
- Only those individuals and agencies on DBHR's registry will be eligible to formally mentor trainee trainers; each trainer or agency will declare if it is able to mentor.
- DBHR may make this Registry available to interested parties seeking trainers.

Trainee notification

This is for the formal mentoring process or becoming eligible to be added as a DBHR approved trainer. All individuals interested in becoming a CPC trainer will complete a Trainee Notification Form (Attachment B) informing DBHR of the desire to be a CPC trainer and be mentored formally.

- The notification will include identification of an

eligible registered trainer mentor or mentoring agency if known, or the need to be connected to a training mentor for purposes of becoming a Registered Trainer.

- If needing to be connected to eligible mentors, DBHR will inform trainee of registered individuals and agencies able to provide trainer mentoring
- If needing a mentor, the individual desiring to be a trainee will connect with identified mentors or mentoring agencies to request opportunity to be mentored.

Some CPCs are already mentored informally by CPC Trainers and may want to have registered CPC Trainer complete the Mentor/Trainee Completion Form (Attachment C) so the Trainee may complete a CPC Trainer Registration Form (Attachment A).

Assessing progress and readiness

How do you know when someone is ready to train on their own? In sports, there are two major factors in evaluating the ability of an athlete, the first is "analytics" or the interpretation of data or information, and the other is the "eye test." Analytics brings together all the performance raw numbers, assessments, evaluations, tendencies, situational responses, and more to evaluate the value of a person in a certain role, at a certain time, and under certain conditions no matter all the variables. The eye test is how a person appears while performing their responsibility, and do you want them there when it counts because you know they will deliver what is needed.

CPC trainings needs trainers that can deliver what has been asked of them, which is exhibiting the foundational and training values of peer support

while skillfully presenting the materials in a safe and managed environment so peers in the class are able to succeed. Mentors and Trainees will mutually and independently work on and assess the areas related to CPC training.

The tools provided to work through the process are:

- Mentor/Trainee Planning Worksheet (Attachment D)
- Mentor/Trainee Values Assessment (Attachment E)
- Mentor/Trainee Responsibilities and Competencies Checklist (Attachment F)
- Mentor/Trainee Modules Competencies (Attachment G)

These tools facilitate clarity of purpose in achieving readiness as a CPC Trainer, are not mandatory to use, and are not intended to be submitted to DBHR. However, each one contributes to supporting positive strength-based completion of formal mentoring and are included as part of the Mentor/Trainee Completion Form (Attachment C) submitted to DBHR.

The tools (Attachments D, E, F, G) offer the opportunity to set goals, measure strengths and progress, and support assessing readiness, and are designed to be flexible in use.

Please note, there is not a set time on completing this process so it is important that the Mentor and Trainee have this discussion as part of the initial planning discussions.

Good to know

In preparing for your first meeting, consider these general questions:

What are your expectations of the mentorship?

What would you like to gain from the program?

What challenges might you face as a pair?

What are your concerns moving forward in the relationship?

What type of career fields interests you? What are your interests or hobbies?

What is your availability going to be? What is a successful outcome for you?

Mentor/trainee completion

The Mentor/Trainee Completion Form (Attachment C) is a “recommendation” from a Mentor of a Trainee’s readiness and ability to be a CPC Trainer. It is a culmination of the mentoring process and should be completed together, signed by Mentor and Trainee, and submitted as one document. Once this has been completed, the Trainee may submit a CPC Trainer Registry application.

Note: All registered CPC Trainers and trainees are expected to attend a minimum of one of the trainers training events throughout the year.

Attachments

Attachment A: CPC trainer registry form

Attachment B: trainee notification form

Attachment C: mentor/trainee completion form

Attachment D: mentor/trainee planning worksheet

Attachment E: mentor/trainee values assessment

Attachment F: mentor/trainee responsibilities and competencies checklist

Attachment G: mentor/trainer modules competencies

Attachment H: helpful information for mentoring and training

Attachment A: trainer registry form

This form is to be completed by a CPC wanting to be on the DBHR approved trainers registry.

Submit the completed form to the Peer Support Program at peersupportprogram@hca.wa.gov.

1

Personal information

First name

Last name

City

Zipcode

Email

Date

2

CPC information

Date (month/year) certified as CPC (please provide a copy of letter from WA DBHR (MHD):

Work(ed) as a Certified Peer Counselor (Supporter, Specialist, Recovery Coach):

Yes

No

If yes:

More than 1 year

Less than 1 year

Training experience

Please describe your training experience including:

- Topics (e.g. recovery, advocacy, trauma-informed, ethics, CPC Modules, etc.)
- Trainees (e.g. peers, behavioral health staff, community, etc.)
- Training lengths and settings (e.g. 90 minute workshop, 4 hours, conference, etc.)
- Solo training or co-training/facilitation

3

References

Provide contact information for two (2) references that have been in trainings you were trainer/facilitator.

Name Contact information (email preferred)

Name Contact information (email preferred)

4

Mentor

Please complete this section if you are interested in being mentored by an experienced CPC trainer, or mentoring potential trainers/trainees.

I want to improve my training skills by connecting with an experienced CPC trainer in my area.

I want to support trainers in my area as a mentor.

Please define any parameters you want to establish regarding mentoring that will assist DBHR for referring you to a mentor or an trainee to you.

Attachment B: trainee notification form

This form is to be completed by a CPC wanting to be mentored and included on the CPC Trainers Registry. Please review the Washington Certified Peer Counselor Trainer Mentoring Handbook prior to completing.

Submit the completed form to the Peer Support Program at peersupportprogram@hca.wa.gov.

1

Personal information

First name

Last name

City

Zipcode

Email

Date

2

CPC information

Date (month/year) certified as CPC (please provide a copy of letter from WA DBHR (MHD):

Work(ed) as a Certified Peer Counselor (Supporter, Specialist, Recovery Coach): Yes No

If yes: More than 1 year Less than 1 year

Training experience

Please describe your training experience including:

- Topics (e.g. recovery, advocacy, trauma-informed, ethics, CPC Modules, etc.)
- Trainees (e.g. peers, behavioral health staff, community, etc.)
- Training lengths and settings (e.g. 90 minute workshop, 4 hours, conference, etc.)
- Solo training or co-training/facilitation

If no training experience, please describe why you want to go through a CPC Trainer trainee.

3

References

Provide contact information for two (2) references that have been in trainings you were trainer/facilitator.

Name Contact information (email preferred)

Name Contact information (email preferred)

4

Mentor

Please complete this section if you are interested in being mentored by an experienced CPC trainer.

I want to be mentored to improve my training skills by connecting with an experienced CPC trainer in my area.

Please explain what type of Mentor will be best for you and why.

Attachment C: mentor/trainee completion form

This form is for the Mentor and Trainee to complete together and submit to DBHR

Submit the completed form to: Amanda Polley at amanda.polley@hca.wa.gov.

1

Mentor information

First name

Last name

Email

Phone

Date

2

Trainee information

First name

Last name

Email

Phone

3

Strengths, values and competencies

Mentor: Identify three strengths of Trainee

- 1.
- 2.
- 3.

Trainee: Identify three strengths of Mentor

- 1.
- 2.
- 3.

Mentor: Summarize how the Trainee trainer met the Values and Trainer Responsibilities/Competencies.

+	Exhibits that values or competencies most of the time
+/-	Sometimes exhibits the values competencies and sometimes doesn't
-	Doesn't exhibit the values or competencies most of the time

Values. Provide a brief summary:

Responsibilities and competencies. Provide a brief summary:

Mentor: Briefly describe any recommendations for the Trainee (including Modules or Topic expertise).

Trainee: Briefly describe any comments regarding Mentor.

4

Recommendation

The Mentor will need to recommend the Trainee be added to the CPC Trainers Registry.

Please note: If a positive recommendation, the Trainee is responsible for completing the Trainer Registry Form and submitting it to Amanda Polley at amanda.polley@hca.wa.gov.

Yes. I am recommending the Trainee identified above be eligible for the CPC Trainers Registry.

Yes. I am recommending the Trainee identified above be eligible for the CPC Trainers Registry with the following suggestions:

No. I am not recommending the Trainee identified above be eligible for the CPC Trainers Registry for the following reasons I have discussed with the Trainee:

Mentor signature

Trainee signature

Attachment D: mentor/trainee planning worksheet

This planning worksheet is for the Mentor and Trainee to use to identify needs and establish goals. This worksheet is for the use of the Mentor and Trainee and not intended to be submitted to DBHR.

It may be helpful to review and use the *Values Assessment*, the *Responsibilities and Competencies Checklist*, and *Modules Competencies* prior to completing this together.

1

Mentor information

First name

Last name

Email

Phone

Date

2

Trainee information

First name

Last name

Email

Phone

3

Trainee needs and goals

Identify three main needs of Trainee.

1.

2.

3.

Identify a plan to meet each of the Trainee needs.

1.

2.

3.

List mutual SMART goals for Mentor and Trainee.

1.

2.

3.

4

Supportive information

Meeting times and methods:

Clarifying expectations:

Challenges and solutions:

How to measure progress and success:

Attachment E: mentor/trainee values assessment

This assessment form is for use by the Mentor and Trainee and not intended to be forwarded to DBHR.

Values meet four elements critical to ensuring quality of CPC trainings and expectations of trainers:

1. Values lead to behaviors in the CPC training that represent a peer supporter;
2. Behaviors become the culture for the training and can continue into the workforce;
3. Culture forms our training and peer supporter community; and
4. Values allows for a variety of individual strengths and training styles.

A vital part of this mentor/trainee relationship is providing honest, strength-based, and constructive assessment of one another's abilities and practices. Consider the mentoring/trainee process and your interpersonal interactions, and practices related to training.

Following are the seven values CPC trainers are responsible for upholding. Think about the Mentor or trainee throughout the process (interpersonal interactions and practices related to training) and rate how they demonstrated the seven values using the following scale:

+	Exhibits the core value most of the time
+/-	Sometimes exhibits the core value and sometimes doesn't
-	Doesn't exhibit the core value most of the time

Inspiring hope: Recognizing potential in everyone through modeling recovery in ourselves.

Empowering: Honoring individual's voice and choice using shared power.

Strengths-based: Draws on the potential and possibilities in every person to continue the individual building process; reframing storms into treasures.

Culturally responsive: Creating a safe environment through respecting diverse perspectives, being observant, creative, and knowledgeable.

Authenticity: Modeling peer support in an honest, inclusive, and trauma-informed way.

Responsibility: Being accountable to self and others through procedural practices and personal development.

Story's power: Realizing through language and action recovery and resiliency's strengths and pathways.

What, if any, supportive feedback can you offer:

Attachment F: mentor/trainee responsibilities and competencies checklist

This assessment form is for use by the Mentor and Trainee and not intended to be forwarded to DBHR.

Best practices for trainers should be demonstrated in the development and delivery of training programs. Training competencies are common across professions, easy to find and are adopted here for our purposes of rating a trainer.

Following are the seven competency areas that CPC trainers are responsible for developing proficiency.

1. Adult Learning
2. Training Delivery Skills
3. Experiential Learning
4. Group Facilitation
5. Transfer of Learning
6. Developing and Using Audio-Visual Media and Materials
7. Professionalism and Ethics

Think about the Mentor or trainee throughout the process (interpersonal interactions and practices related to training) and rate how they demonstrated the seven competencies using the following scale:

+	Exhibits the competency most of the time
+/-	Sometimes exhibits the competency and sometimes doesn't
-	Doesn't exhibit the competency most of the time
N/O	Not observed during training

Each section has a place for comments to provide to the Mentor or Trainee how well they address the competencies or supportive suggestions for improvements.

Adult learning

The trainer **understands and can apply principles of adult learning** to training development and delivery. This includes: engaging learners to identify their own learning needs; helping trainees set personal learning objectives; drawing on and incorporating trainees' past experiences and expertise; using experiential and interactive training techniques; helping trainees apply training content to their roles and responsibilities as peer supporters and in their jobs; and creating practice opportunities during the training session.

The trainer can **create a comfortable physical learning environment** and orient trainees, including: preparing the training room, greeting and engaging trainees, and attending to the social, emotional and comfort needs of the learners.

The trainer: knows the conceptual frameworks for describing learning styles; can recognize differences in trainee learning preferences and styles; understands how individual development and cultural background can impact learning preferences; and can develop and use training strategies that address a variety of learning styles and preferences.

The trainer understands: the typical stages in the development and mastery of new knowledge and skills; the adult learning paradigms that represent these steps and can utilize or develop training materials that promote sequential development.

Comments:

Training delivery skills

The trainer: recognizes the impact of the physical training environment in facilitating or impeding learning; can arrange the training room to promote comfort, interaction, and group development; and can assure that training facilities are easily accessible to persons with disabilities.

The trainer **can use a variety of self-management strategies** to reduce personal stress and stage fright associated with public speaking.

The trainer understands the impact of personal appearance and dress, physical positioning in relation to trainees, hand and body movements, positioning of a podium or tables, and tone of voice, on both the quality of presentation and receptivity of trainees.

The trainer demonstrates the use of name tags/name tents, “ice-breaker” exercises, introductions, and other activities at the beginning of a session to **create a positive group climate** and begin the engagement process.

The trainer: demonstrates the ability to speak clearly at an appropriate volume; can vary volume, pace, tone, and inflection to maintain trainee’s attention; and can avoid unnecessary and distracting vocalizations (“uh,” “ummm,” “you know,” “like,” “I mean”).

The trainer can **adjust** their presentation methods, use of language, and group management style to achieve the optimal level of formality for the group, and/or to match learners’ level of expertise.

The trainer understands the potential impact of learners having been mandated to attend training, and can use supportive engagement strategies to help trainees identify personal learning objectives and develop an investment in the training.

The trainer **demonstrates the use of reflective listening** (a best practice technique for peer support) and feedback to encourage group involvement, to clarify and expand upon trainee contributions, to guide the direction of the discussion, and to enhance trainees’ understanding of the content and concepts.

The trainer can **use verbal enhancers** that more fully communicate and explain essential concepts and information, including examples and illustrations, creative phrasing, analogies, quotations, rhetorical questions, and comparing and contrasting concepts.

The trainer can **use summation, bridging, and segue** to help preserve continuity when moving between segments of the training.

The trainer knows **strategies to keep the group focused**, on task, and within established time frames, while remaining responsive to group needs and concerns.

The trainer knows **strategies to engage and involve** trainees who display resistance or a lack of involvement, or who exhibit disruptive behaviors that interfere with the development of constructive group process.

The trainer can use information from written participant evaluations, evaluation summaries, and feedback from trainees and appropriate agency staff to **identify opportunities for improving the training**.

Comments:

Experiential learning

The trainer **appropriately uses experiential exercises** to increase awareness, modify attitudes, challenge misconceptions, and facilitate learning and mastery of both knowledge and skills.

The trainer **demonstrates understanding of the detrimental outcomes** of using experiential exercises inappropriately, or placing them improperly in the curriculum sequence.

The trainer **designs and develops** a variety of individual, small group, and large group experiential exercises and activities that enhance learning and application.

The trainer **facilitates experiential activities** by clearly and concisely explaining instructions; providing ongoing direction and feedback to trainees; helping process and draw conclusions about the exercise; and engaging in problem solving when the activity is not progressing or accomplishing learning objectives.

The trainer **elicits information to evaluate** the effectiveness of experiential activities in achieving objectives, and can make needed modifications.

Comments:

Group facilitation

The trainer: clearly and accurately communicates the goals and objectives of the training; can help trainees identify unrealistic expectations for the training; and can negotiate to achieve consensus about the desired outcomes for a training session.

A highly skilled trainer supports the group members clarify, negotiate, reach consensus, and adhere to norms or ground rules for the training session; and can enter into a verbal contract that establishes the trainer's role in supporting and enforcing these norms.

The trainer **uses group facilitation strategies** that promote the development of a safe, learner-centered environment, group cohesion, comfort with risk taking (such as role playing, singing, or speaking before their peers), and commitment to common learning objectives.

The trainer: chooses the training strategy best suited to meet a particular learning objective; and integrates a variety of strategies to address different learning styles and to keep the training from becoming repetitious or boring.

The trainer: can recognize non-verbal cues from trainees; can use active listening and reflection to determine their meaning; and can elicit feedback to clarify points and to determine the level of understanding or agreement.

The trainer demonstrates **understanding of the factors that can create resistance and dissension** within training groups, including: a lack of pre-training preparation; forced attendance at training; pre-existing interpersonal conflict among group members; problems in the work environment; and personal, social, and emotional factors of trainees.

The trainer **utilizes a variety of group management strategies**, and intervenes to manage problematic behaviors without alienating either the individual or group

The trainer **provides timely, sensitive and relevant feedback** to the group, and can challenge ideas in a manner that stimulates creative thinking and promotes growth, while maintaining trainees' self-esteem.

The highly skilled trainer: recognizes, processes, and understands trainees' emotional responses to training content or exercises; can acknowledge and normalize feelings; can help the group identify constructive ways to deal with feelings; and can intervene to help individual trainees deal with acute emotional distress.

The trainer **effectively handles confrontation and conflict** with and between trainees; and uses a series of verbal and non-verbal interventions to de-escalate the conflict, explore and clarify the issues, and facilitate resolution, while discouraging disruptive behavior and preventing emotional withdrawal. \

Comments:

Transfer of learning

The trainer **understands the concept of learning as a “process rather than an event”** and identifies opportunities and activities to promote transfer before, during, and after the training event.

The trainer understands: the roles of peer supporters, supervisors, trainers, and learners in promoting transfer; the importance of supervisory intervention with learners both before and after training; how organizational or institutional barriers can prevent transfer; and can work collaboratively with others to design and implement effective transfer of learning objectives.

The trainer **understands the impact of individual learning preferences and culturally based learning styles**, and can design a variety of teaching and transfer strategies that address different styles.

The trainer **gives relevant examples and encourages critical assessment** of how new learning can be applied to trainees' jobs/roles and responsibilities; elicits examples of practice dilemmas and successes; and can help trainees identify and resolve barriers to application of new learning in the program or work place.

The trainer **demonstrates understanding of the sequence and stages** in acquiring and mastering new knowledge and skills; and knows how and when to use mentoring, coaching, and other on-the-job training (site based technical assistance) activities to promote continued trainee development.

The trainer helps to **assess and provide feedback regarding trainees' acquisition of knowledge** and skill at the completion of training; and can recommend additional professional development opportunities, self-development or training activities to promote skill development.

The trainer **employs a variety of assessment methods** to be used before, during, and after training to measure the impact of training; and can collaborate with training managers to implement comprehensive evaluations of training effectiveness.

Comments:

Developing and using audio-visual media and materials

The trainer **designs, develops and/or incorporates a variety of audio-visual materials** including flip charts, posters, overhead transparencies, computer generated visuals, handouts, slides, videos, and audio tapes, to enhance the training and reinforce learning.

The trainer **selects and incorporates audio-visual materials** that best support the content being presented.

The trainer **integrates computerized training aids** to enhance training, and can design and develop presentations and demonstrations using software such as Power Point.

The trainer **designs, produces and distributes handouts** in a logical and organized manner.

The trainer can **operate, disassemble and make emergency repairs** to audio-visual equipment, including flip chart stand, projector, video recording equipment, audio player, LCD projector and computer.

The trainer **can use a contingency plan** with alternative instructional methods in the event of equipment failure or unexpected emergency, or to accommodate trainees with visual or auditory disabilities.

Comments:

Professionalism and ethics

The trainer **maintains a professional demeanor** in the training environment, including maintaining standards for dress, adhering to pre-set time frames for the training, and being well organized and fully prepared for the training.

The trainer **demonstrates understanding, and incorporates into practice, the values, ethics and standards of the professions** and the practice/ fields in which trainees work; and can address and reinforce these in all training activities.

The trainer **models standards for adult learning and professional development**, including: respect for trainees; supporting trainees' self-determination; and maintaining appropriate confidentiality, privacy, and self-disclosure.

The trainer **knows the core philosophy and values that underlie the trainees' field(s)** of practice (i.e. foundations of peer support, regulations related to peer support, adult services, public human services, etc.); and can integrate this information throughout the training.

The trainer can **articulate the concepts of best practice in peer support services**, and knows the unique role and responsibility of the trainees' programs, agency(ies) and staff.

The trainer **knows the "best practice" standards** that apply to the field of practice and competency area they train.

The trainer fully **understands the liabilities** of attempting to train in competency areas in which the trainer lacks sufficient knowledge, skill, and/or first-hand experience.

The trainer **understands the importance of keeping current on laws, state mandates, and practice changes** in the fields/related fields of peer support and services, and can incorporate up-to-date information into training curricula.

The trainer **knows the laws** regarding copyright and plagiarism, and knows how to fully and accurately cite sources for materials used in the curriculum.

Comments:

Attachment G: mentor/trainee modules assessment

This assessment form is for use by the Mentor and Trainee and not intended to be forwarded to DBHR.

The CPC Training Manual has 10 Modules. Each module supports developing competencies for Peer Support workers. It is important that the trainers of these modules have experience with the topic and the ability to transfer knowledge and skills based on their experience to the peers in the learning environment.

Following are the 10 Module CPC trainers are responsible for training during the 36-hour course. Think about the Mentor or Trainee's experiences as a CPC and topical expertise, and rate their abilities to train on a module using the following scale:

+	Exhibits the core value most of the time
+/-	Sometimes exhibits the core value and sometimes doesn't
-	Doesn't exhibit the core value most of the time
N/O	Not observed or unaware of abilities

Module 1: Defining Your Role

Module 2: Forming Peer Partnerships

Module 3: Working From Trauma-Informed Perspective

Module 4: Ethics and Boundaries in Peer Support

Module 5: Cross-Cultural Partnerships

Module 6: Supporting Goal Setting

Module 7: Treatment Planning, Documentation and Supervision

Module 8: Facilitating Groups for Recovery

Module 9: Supporting Self-Advocacy

Module 10: Planning for Success as a CPC

What, if any, supportive feedback can you offer:

Attachment H: helpful information

Qualities of a Mentor

Mentoring for apprenticeship by Keystone Development Partnership

Good communications skills

- Present information clearly and consistently
- Demonstrate good listening skills
- Provide timely and effective feedback

Patience

- Tolerate mistakes
- Repeat information as needed

Sense of humor

- Laugh off some of the things that will go wrong
- Say that it's OK when someone makes a mistake
- Remember that mistakes in training are not the end of the world

Desire to be a Mentor

- Enjoy helping people learn
- Sincere
- Honest

Good work habits

- Role model for expected behaviors
- Praise for a successful performance
- Provide assistance
- Rescue trainees before they fail on their own

Trustworthy and respectful

- Your trainee must trust and respect his/her mentor so that the training process is successful
- The mentor needs to trust and respect the trainee

Mentors as coaches

Purpose of coaching

- To focus on effort and improvement
- To redirect behavior; not to point out mistakes, blame or criticize

Coaching techniques

Question your trainee

- Gather more information
- Clarify the subject
- Check for understanding

Redirecting your trainee

- A questioning technique you use when an trainee attempts to carry out one of the steps incorrectly
- Ask questions like:
 - “Why won't it work?”
 - Mentor Action - Point out areas of problem.
 - “How else could you do it?”
 - Mentor Action – Demonstrate options for problem solving.
- Make statements like:
 - “If you do it that way, this is what happens.”
 - Mentor Action - Point out undesirable outcome.
 - “See what happens when you do it that way.”
 - Mentor Action - Demonstrate the correct action

Giving instructions

Adults as learners

Characteristics of an adult learner

- Bring previous knowledge and experience to the new job
 - Link new material to their existing knowledge and experience.
- Are goal oriented
 - Participate in learning programs to achieve a particular goal
- Have a finite interest in types of information
 - Primarily are interested in aspects of the content that affects him/her directly
- Have different learning styles
- Have different motivation levels

Needs of an adult learner

- Be an active learner
- Receive feedback from his/her trainer
- Have a directed learning plan
- Take responsibility for his/her learning

Adult learners choose to learn when they:

- See a need or benefit
- Have a problem to solve
- Can relate new information to what they already know
- Can apply what they learn in the “real world”
- Trust the trainer

Techniques for effective learning

- Describe the context first, followed by specific instructions with examples.
 - What is said first orients the listener and gives him/her a frame of reference for each direction that follows.
- Control the amount of information you give at one time.
 - Check what the listener knows and add bits of new information that he/she can manage. Remember that most people’s attention span is short. Emphasize key points.
- Use language your listener will understand.
- Avoid a rush of specialized new words or concepts.
- For complicated explanations, summarize key points at the end of your discussion.
- Ask for and sincerely encourage questions.
 - It is a good way to know what the trainee did or did not understand.
- Decide if you need to ask for feedback:
 - “Are we on the same page with this?” or “Can you show me how to do it?”
- Create a respectful atmosphere for learning.

Adult learning styles

Adult learning styles are a person’s preferred way to learn new skills and knowledge. There are three styles:

- **Auditory** (Hear)
- **Visual** (See) by Written or a Picture
- **Doing** (Kinesthetic)

Three learning styles

- Auditory learner
 - Prefers spoken instructions
 - May have difficulty with reading and writing tasks
 - Often learns a task if he/she talks to a colleague or into a recorder to hear what is said
 - Often talks to him/herself
 - May move his/her lips and read out loud
- Visual learner
 - Written
 - Learns through written language
 - Remembers what was written down
 - Likes to write down directions/instructions
 - Pays attention to lectures if they watch them
 - Pictures
 - Learns better with charts, demonstrations, videos, and other visual materials
 - Visualizes faces and places by using his/her imagination and seldom gets lost in new surroundings
 - May have difficulty learning the task if given only written material
- Learning by doing (Kinesthetic learner)
 - Learns if he/she can do and move
 - Tends to get bored if he/she sits still too long

Passive vs active learning

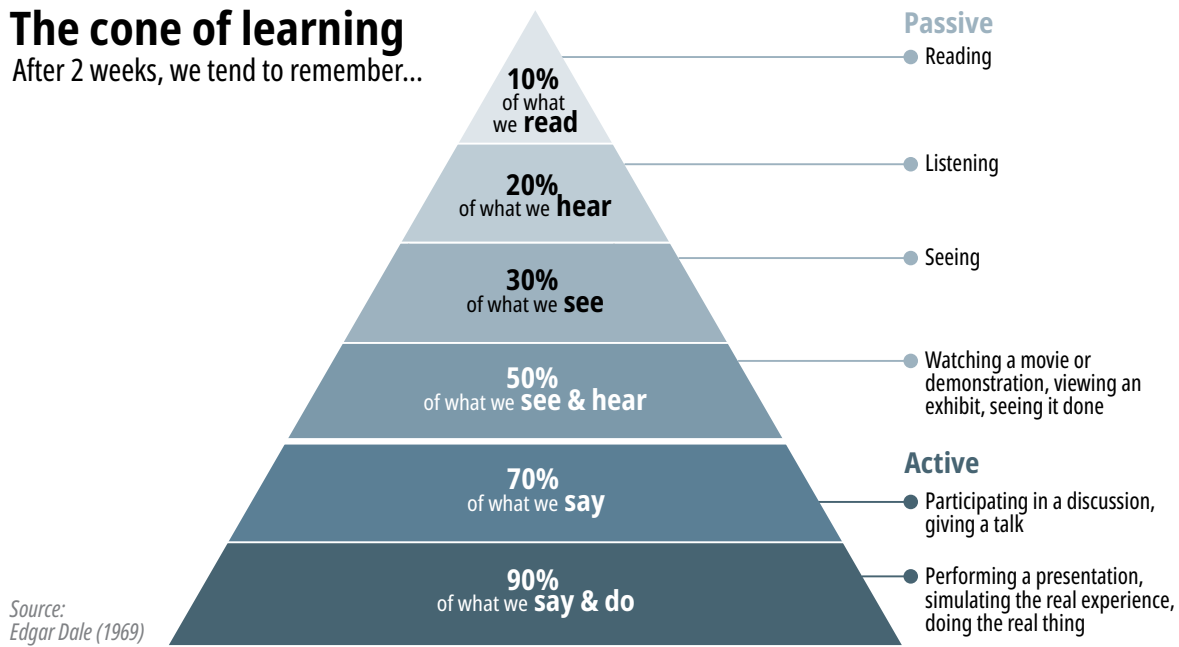
- **Passive learning** involves your trainee recording and absorbing knowledge.
 - During passive learning, the MENTOR is responsible for the learning.
- **Active learning** involves your trainee directly and actively in the learning process.
 - During Active learning, the TRAINEE is responsible for the learning.

Method	Activity	Level of trainee involvement
Mentor reads	Reading from a book, manual, etc.	Passive
Mentor speaks	Hearing	Passive
Mentor shows	Reviewing pictures, diagrams, etc.	Passive
Mentor shows and speaks	Looking at pictures, watching a movie, watching a demonstration, seeking the task done at the location	Passive
Trainee speaks	Participating in a discussion, describing the job	Active
Trainee speaks and does	Describing the job, simulating the real experience, doing the real thing	Active

The responsibility to learn the task belongs to the learner.

The cone of learning

After 2 weeks, we tend to remember...



Edgar Dale's Cone of Learning, developed in 1946, illustrates different ways that people learn. The visual shows the difference between active and passive learning. It is not meant to value one learning style over another.

The shape of the cone and movement from the bottom to the top is not related to comprehension. It shows the degree or levels of learning that occurs when you combine and engage learning styles such as reading, hearing, seeing, or doing.

If you move from the top of the cone down toward the bottom, you see an increase in learning when a person's senses are engaged. When a person's senses are separate from the lesson then it is a passive learning style, because they are doing what is being taught. No matter how hard you listen during a lecture, if that is your only engaged sense, you are only going to comprehend 10% of what you hear. While listening is essential for learning, when it is used on its own, listening is not as effective as when a student interprets what they heard or experiences the lesson in other ways.

Active learning is when the student participates or demonstrates what they learn through performance. These actions call for multiple senses — speaking, performing, simulating - doing. They rely on a mixture of the learning styles. The more learning styles a person experiences in the training process, the more he or she will learn.

Training reflection

Mentors will observe their Trainee training. Upon completion of the observation, the Trainee will use the following questions to reflect on the training module or topic to guide the discussion with their mentor.

In addition, the Trainee should observe their Mentor or additional trainer and use the following questions for a discussion.

- As I reflect on the training, to what extent were the peers engaged in the work?
- How did the training allow peers to engage in activities and learning situations that required critical thinking or problem solving?
- What feedback did I receive from peers indicating they achieved understanding of the content?
- Did I consider, or indicate, to peers how I planned to assess them on the information presented/ practiced?
- How did I assess making instructional decisions throughout my training?
- If I had the opportunity to train on this topic again to a similar or same group of peers, what would I do differently?
- If there were one thing from this training that I could share with a colleague, what would it be?

Trainer as a facilitator

People often use the terms “facilitator”, “instructor” and “trainer” interchangeably. We call this competency category “facilitating” because it means, literally, “Making things easier”.

Facilitation of training ensures:

- The environment is conducive to learning,
- Learners are as engaged in learning as possible,
- Opportunities for learners to interact and practice are optimized,
- Special needs of individuals and groups are respected,
- Achievement of learning objectives is assessed, and
- The facilitator appropriately represents the values of CPC Trainers.

The Mentor and Trainee will be assessing the following Facilitator Training Competencies:

Prepare to facilitate/train

- Become familiar with training content and design
- Ensure training supports desired performance outcomes
- Coordinate logistics

Create learning environment

- Establish physical learning environment
- Attend to social and emotional needs of learners
- Establish responsibilities for the success of training
- Model appropriate behavior
- Manage disruptive or counter-productive behavior

Engage learners

- Deliver content and instructions
- Lead group discussions
- Respond to learner questions and comments
- Use differences and controversy to enhance learning
- Optimize use of visual aids and equipment
- Use classroom tools

Foster learning

- Demonstrate subject matter expertise
- Facilitate individual and group activities
- Facilitate to support transfer of learning

Assess learning

- Confirm learners have prerequisite skills and knowledge before training begins
- Assess individual achievement of learning objectives

Outside of the training environment:

- Communication: How well do the Trainees communicate needs, information, schedule, etc?
- Preparation: is there a training plan put in place? Does it incorporate learning styles, time

management, flexible elements, subject knowledge understanding, etc?

- Demonstrates understanding of content design and intent of materials
- Time management
- Meeting expectations in time and as assigned
- Assessment/evaluation
- Seeks learning opportunities

Training

- Punctual and prepared
- Has materials ready
- Rapport building, connectedness
- Demonstrates curiosity and openness to inquiry
- Ability to use tools and equipment
- Demonstrates ability to “manage” the environment

Flexibility

- Uses values as platform for engaging class
- Strong time management
- Demonstrates depth of understanding of subject matter Demonstrates CPC skills
- Sets up and maximizes skills demonstration exercises
- Strengths-based

Skills

- Incorporates learning skills
- Demonstrates values
- Communication: clarity, effectiveness, gender-neutral, etc.