Training is a critical element of any Behavior Management Program. Many organizations have already implemented commercially packaged crisis intervention programs, or have developed their own custom versions. The type of training program chosen by management should be based on the system that best meets the needs of the individuals they serve.

Training Content
Whether using a commercial or internally developed training program, at a minimum, training content should cover:

- Effective communication skills
- Initiating and developing relationships with individuals
- Crisis cycle or aggression cycle (baseline → trigger → escalation → crisis → calm down → recovery and possible crash)
- Identifying the general signs of escalation/agitation
- Personal space of the individual
- Effective redirection/de-escalation techniques
- Self-defense/protection measures to minimize effect of behavioral outburst

It's critical that at each stage of the training staff be allowed to practice and demonstrate competency in the skills they are learning. While many programs require demonstration of the self-defense or protective measures being learned, it's even more critical that staff practice and demonstrate their competency with skills and abilities for identifying escalation and the means to redirect undesired behaviors. Learning theory indicates that the more actively a staff member is involved in the training, the more they retain. The more they retain, the more likely they are to utilize that specific skill.

It's also important for staff to participate in non-physical methods of de-escalation and redirecting behaviors. If staff only participate in self-defense and restraint techniques, they may be more likely to resort to physical reactions when presented with an individual who is going through a crisis incident. While this goes against the philosophy of most organizations, the staff has been predisposed to this course of action because of the emphasis placed on the physical element of the training.

Behavior Identification and De-Escalation Techniques
The suggested best practice for staff training is to ensure they spend time observing escalation/agitation so they can identify such behavior. They can then practice redirection/de-escalation techniques in one of the following ways:

1. The organization can videotape staff role playing multiple real-life situations depicting both individuals going through the crisis cycle, as well as staff reacting to the crisis. The video can then be paused at the trigger, escalation and crisis phases so staff can comment on what they are observing and how they would react. The staff and trainers role playing could also depict correct and incorrect practices during the video, so staff can critique what occurred.

2. Staff and trainers can do live role-playing during the training. Just like the video-recorded role playing, staff can observe the stages of the crisis cycle, indicate how they would react and critique how the staff addressed the situation.

3. When there are experienced trainers or staff present, group discussions can occur on common triggers, signs of escalation/agitation and successful redirection measures.

4. When there are experienced trainers or staff present, the staff themselves may role-play the individual served. A staff member may act out common situations that could be encountered.

The intent of these best practices is to allow staff the ability to see and experience real-life examples of the crisis cycle. By practicing the non-physical techniques repeatedly, they can learn to instinctively react to situations using the non-physical support techniques. Ideally staff will be allowed to spend more time practicing and demonstrating their abilities to use non-physical methods of de-escalation, rather than focusing on using physical techniques to redirect behaviors.
Training Frequency

1. **New Staff Orientation and Initial Training**
   This initial training should be a requirement for all new staff before working alone with individuals served, regardless of experience. The training should be a stepped process and sufficiently broad in scope to give a thorough understanding of the behavior management program, crisis intervention, policies and procedures to be followed in performance of the job.

2. **In-service/Refresher Training**
   Ongoing in-service training is needed for staff to sustain the core skills required to effectively work with the individuals served. Training may be conducted based on the skill requirements outlined in the specific behavior management program system used, injury data and trend analysis, supervisor observations, reported behavior incidents and training needed to fulfill state requirements. A best practice for refresher training is to conduct multiple short sessions throughout the year with each session focused on a specific skill or issue.

   By focusing on a single skill in shorter sessions, staff will likely retain more of the information presented than they would if they receive just one longer-duration refresher session. For example, if the crisis/behavior intervention training program requires that staff complete four hours of refresher training per year to maintain certification, it’s suggested that you provide staff with eight half-hour sessions during the year for a total of four hours of refresher training.

   In addition to providing multiple short sessions, refresher training should focus on issues/topics most relevant to the organization and needs of the individuals served.

3. **Post Incident**
   Following an incident that results in injuries, post-incident debriefing and training should be provided to staff directly involved. Refresher training does not have to be comprehensive, but can simply focus on the issues related to the incident, steps which could have been taken to prevent the situation and alternative methods, which may have been used to de-escalate the behavior. Training should provide staff with additional techniques they can use to prevent the recurrence of similar situations. This post-incident training may be included as a component of the debriefing process.

4. **Staff on Extended Leave**
   When a staff member has been off work for more than 90 days, they should be provided with comprehensive refresher training on relevant behavior intervention methods before working alone with individuals served. These staff members should also receive a review of their roles and responsibilities.

**Individualized Training**

New staff, in-service and extended leave training sessions are typically generic in nature, providing an overview of the behavior management program. When staff are assigned to a specific department, home or individual, they must receive specific training and behavior support plan information about the individuals they will be serving. A supervisor will provide staff with training on the specific characteristics of the individuals they are assigned. This should include a thorough review of individual behavior support plans and any history of behavioral incidents. A key to making this training successful is to ensure that, at a minimum, the following are reviewed for each individual to be served:

- Specific antecedents leading to escalation or behavior change (both positive and negative behaviors)
- Specific signs of escalation/agitation
- Re-direction/de-escalation techniques that have been proven successful
Training Checklist, Staff Signoff and Documentation
A checklist should be used to verify all elements of the training were completed. A staff signoff sheet will document they attended the meeting and received materials provided during the training. All completed training must be documented and maintained on record.

At a minimum, training documentation should include:
- Date
- Duration
- Name of the trainer
- Summary of the training content
- Printed name and signature of the staff in attendance

When staff demonstrate competency of a skill during training, additional documentation should be retained, which includes:
- A description of the skill demonstrated
- The name of the staff or trainer demonstrating the skill
- Date of the demonstration
- The name and signature of the trainer or supervisor certifying the skill was properly demonstrated

New Staff Training Schedule
The following sections break down the sequential steps to follow when conducting new staff training. Section 1 should be completed prior to the staff performing on-the-job training in Section 2.

Section 1: Job Description, Behavior Management Program, Policies
1. Review new staff member’s job description.
2. Training on the general concepts contained within the behavior management program.
3. Successful completion of the non-physical behavior management program training.
4. Review the organization’s policies regarding physical interventions. The staff member is not permitted to participate in any physical intervention until the training is complete.

Section 2: On-the-Job Training
1. Supervisor and other staff review and train on the daily work activities and routine.
2. The new staff member will observe and assist other staff performing the job (three to five shifts).
3. The new staff member will lead the daily job functions, while other staff assist and provide coaching on the skills necessary for the job (three to five shifts).

Section 3: Behavior Management Program Training
1. The new staff member will receive detailed and comprehensive training on the organization’s Behavior Management Program. They will participate and successfully complete non-physical and physical (if applicable) sections of the program. This may be a commercially-purchased program, or a custom program developed for the organization’s specific needs.
2. The new staff member must successfully complete a classroom hands-on skills assessment, demonstrating non-physical de-escalation and crisis intervention skills.
3. (If applicable) New staff member must successfully complete a classroom hands-on skills assessment demonstrating physical intervention skills.
New Staff Review Schedule — Behavior Management Program

Week One
1. Supervisor will ask peer staff working with the new staff member if there are any issues or concerns identified during the first week.
2. Supervisor will ask the new staff member if there are any questions or concerns from the first week.
3. Supervisor will address any questions or concerns.
4. Review will be documented.

Week Two
1. Supervisor will ask peer staff working with the new staff member if there are any issues or concerns identified during the first two weeks.
2. Supervisor will ask the new staff member if there are any questions or concerns from the first two weeks.
3. Supervisor will address any questions or concerns.
4. Review will be documented.

Month One
1. Supervisor and the new staff member review the training checklist and determine a plan for completing any outstanding training requirements.
2. Supervisor will ask peer staff working with the new staff member if there are any issues or concerns identified during the first month.
3. Supervisor will conduct observations of the new staff member working in their job setting. The supervisor will provide coaching in areas where improvement is needed.
4. Supervisor will ask the new staff member if there are any questions or concerns from the first month.
5. Supervisor will address any questions or concerns.
6. Review will be documented and signed by staff member and supervisor.

Month Two
1. Supervisor and new staff member review the training checklist and determine a plan for completing any outstanding training requirements.
2. Supervisor will ask peer staff working with the new staff member if there are any issues or concerns identified during the first two months.
3. Supervisor will conduct observations of the new staff member working in their job setting. Supervisor will provide coaching in areas where improvement is needed.
4. Supervisor will ask the new staff member if there are any questions or concerns from the first two months.
5. Supervisor will address any questions or concerns.
6. Supervisor will review the new staff member’s progress performing the job. Concerns will be documented, and plans put in place to correct those concerns.
7. Review will be documented and signed by staff member and supervisor.

Month Three — End of Probationary Period
1. Supervisor and the new staff member will review the completed training checklist, including any programs or policies the new staff member may have questions about or for which they exhibit unsatisfactory skills.
2. Supervisor meets with peer staff and reviews any concerns about the new staff member's skills and abilities to perform the job.
3. Supervisor will conduct observations of the new staff member working in their job setting. Supervisor will provide coaching in areas where improvement is needed.
4. Supervisor will review any concerns with the new staff member.
5. Supervisor will determine if adequate skills have been learned, or if a performance improvement plan is needed.
6. Supervisor will review and establish a plan for any areas the new staff member needs additional training or skill development.
7. Review will be documented and signed by staff member and supervisor.