Collaborative Research Grant Initiative: Mental Wellness in Seniors and Persons with Disabilities

Seed/Bridge Fund Final Report

Best Practices in Staff Training to Support Adults with Complex Service Needs

August 31, 2011 - Joan Lee
EXECUTIVE SUMMARY

Staff training to support adults with complex service needs is limited within the Community Disability Services sector and in other human service sectors (e.g., psychology, health care). Increased training for front-line staff and specialist professionals is necessary for greater systems integration and enhanced service provision and care.

The intent of this initiative was to: a) gather information on training needs and gaps across multiple sectors providing services to individuals with complex needs, and b) identify the infrastructure necessary for the development of a staff training program. A literature review, online environmental scan and expert consultations were conducted followed by a Complex Needs Discussion Forum to engage cross-sector professionals.

The results highlight a lack of training addressing overlap and interactions between the multiple needs present in complex needs cases (e.g., interactions between developmental disabilities and mental health concerns) within the Community Disability Services sector and across human service sectors. Barriers such as resource constraints, workforce diversity and sector isolation hinder the development of new training. Results indicate the need for a multi-faceted approach focusing on foundational, specialized, experiential and complementary components of training. Recommendations include:

- identification of best practices in increasing coordination between human service sectors (e.g., inter-disciplinary teams)
- increased collaboration in development and delivery of complex needs training
- centralized coordination of available training
- increased use of online training methods
- increased standardization and consistency of training across the sector
- increased accessibility of specialist professionals (e.g., psychologists)
- dedication of adequate resources
**RESEARCH OVERVIEW**

**Objective(s)**
Vecova Centre for Disability Services and Research in collaboration with the Calgary Region Community Board Persons with Developmental Disabilities (PDD Calgary), and the Calgary Region Complex Service Needs Committee conducted Phase 1 of the Best Practices in Staff Training to Support Adults with Complex Service Needs initiative with the intent to:
(1) gather information on training needs and gaps across multiple sectors providing services to individuals with complex needs; and
(2) identify the infrastructure necessary for the development of a staff training program.

**Background**
Individuals with complex needs typically require high levels of intervention or specialized services from multiple systems and considerable support to maintain stability. Past research studies point to the need not only for greater systems coordination and integration, but also for staff training specific to the span of issues presented by individuals with complex needs. Gaps in training reduce the capacity of the Community Disability Services sector and other related sectors to provide the level of service and support required. Establishing streamlined and seamless services for individuals with complex needs requires increased collaboration between human service sectors (e.g., disability services, health, housing, justice, mental health, etc.) and increased staff training both within and across sectors.

**Approach and Methods**

**Definition of Complex Needs**
In this initiative, individuals with complex needs are defined as: individuals with cognitive impairments (however caused- i.e., due to developmental disability, acquired brain injury or other factors) and coexisting challenges due to mental illness, behavioural or medical problems.

**Literature Review, Environmental Scan and Consultations**

**Literature Review**
A literature review was conducted on academic peer-reviewed journals and government documents from multiple disciplines in North America, the United Kingdom and Australia and were retrieved through multiple databases (e.g., PsycINFO, Health Source: Nursing/Academic Edition, the Sociological Collection, Criminal Justice Abstracts, etc.) using search terms identified through background research and reviewed for validity by sector experts (e.g., dual diagnosis, complex needs, multiple diagnosis, staff development, staff training, etc.). The review was restricted to articles and reports that have a prevalent presence in the literature (e.g., are frequently cited), were published in the last 10-15 years and are from jurisdictions similar to the Canadian context.

**Environmental Scan**
An irregular, formal environmental scan was conducted to review online grey literature identifying existing training as well as training needs, issues, gaps and barriers within multiple human service sectors in Alberta.

**Consultations**
One-hour consultations were conducted with 25 key informants working in the area of complex needs within or across multiple sectors in Alberta (e.g., disability, health care, housing, justice and mental health). Key informants (i.e., senior staff/management or specialist professionals such as psychiatrists, psychologists, etc.) were identified by the Calgary Region Complex Service Needs Committee and were

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recruited by e-mail and consultations were conducted using a semi-structured interview guide. The purpose of the literature review, environmental scan and consultations was to identify:

- information dissemination/knowledge sharing systems existing for complex needs
- best practices in staff training
- key issues, gaps and barriers in existing training
- key content areas for future training

**Complex Needs Discussion Forum**
A Complex Needs Discussion Forum was held on May, 19, 2011 which brought together the Calgary Region Complex Service Needs Committee and 32 additional cross-sector professionals (approx. 40 participants) with expertise in the area of complex needs to: a) share our research findings, and b) discuss future directions and recommendations for a coordinated approach to staff training. The forum followed a Discussion Café format and involved 4, 30-minute group discussions that focused on one of the 4 core training components presented in the model developed through the environmental scan.

**Key Findings**

**Training Availability**
Across sectors, few training programs address interactions between disability, mental health, behavioural and medical challenges. Increased training opportunities could help front-line staff and specialist professionals to:

- appropriately address challenging behaviours among clients with complex needs
- reduce misconceptions about individuals with complex needs that negatively affect the quality of care provided
- understand the needs of individuals with developmental disabilities and how the care needs of adults with complex needs differ from those of the general population

**Key Issues, Barriers and Gaps**
Many human service sectors face challenges in training staff supporting individuals with complex needs. Key challenges include:

- a lack of information on best practices in staff training regarding complex needs
- resource constraints
- workforce diversity
- isolation from other human service sectors

**Approaches to Staff Training**
Current approaches used in staff training regarding complex needs have not been identified as best practices due to a lack of systematic evaluation and replication. Approaches and models used in staff training related to complex needs include the:

- **Whole Workforce Approach** - all staff are trained together, regardless of their level of involvement with individuals with complex needs.
- **Tiered Training Approach** - multiple training sessions/levels are designed to provide training targeting the level of knowledge of complex needs appropriate for staff members with varying information needs.
- **Mentorship Approach** - an experienced local mentor is assigned to provide in-person support and guidance to enhance learning and application of the material presented online.
- **Pyramidal Approach** - a train-the-trainer model that involves training experienced staff to teach the program content to others in their organization.
- **Interdisciplinary Approach** - involves individuals from multiple sectors in training by offering training to all participants together.

**Key Content Areas for Complex Needs Training**
Key content areas to be considered in the future development of training for staff supporting individuals with complex needs can be classified into 4 inter-related components:

1. **Foundational Training** - provides a basic level of knowledge on general topics related to providing front-line supports to individuals.
(2) **Specialized Training** - builds on foundational knowledge to provide staff with more detailed knowledge and skills required to support individuals with complex needs.

(3) **Experiential Training** - takes place through hands-on experience with support and guidance from co-workers, supervisors and specialist professionals (e.g., psychologists).

(4) Complementary Training - includes relevant resources, tools or information sharing opportunities that can be accessed by individual staff members when required or available.

**Figure 1: Training Components for Complex Needs**

**Further Directions for Staff Training in Complex Needs**

Moving towards a collaborative approach for staff training to support individuals with complex needs will require careful consideration of sector recommendations for the development of each training component (e.g., foundational, specialized, etc.) as well as recommendations for the entire model. Key recommendations from the Community Disability Services sector (i.e., government staff, service providers and health/mental health professionals with specializations in disability) include:

**Foundational Training**
- evaluative process for identifying strong foundational training programs that represent best practices and can be shared
- adequate resources to ensure training programs have the capacity to meet the demands of the sector (e.g., frequency)

**Specialized Training**
- support from funders and ownership by service providers (i.e., service providers develop content, maintain and enhance training)
- involvement of specialist professionals in multiple human service sectors in developing and delivering content (e.g., psychologists, occupational therapists, pharmacists, etc.)
- development of training resources within the disability sector that can be integrated into other sectors to create connections and provide interdisciplinary learning

**Experiential Training**
- resource teams of specialist professionals available to provide support, advice and on-site, person-centred training when necessary
• mentorship programs within service providers to connect staff and supervisors to provide on-site, on-the-job training and support
• enhanced communication opportunities between staff and supervisors to provide more in-person support and to strengthen problem solving skills
• enhanced opportunities for peer-learning (e.g., debriefing, team meetings, etc.)

Complementary Training
• user-friendly online resources (e.g., database) to collect relevant materials (e.g., articles, training manuals, fact sheets, etc.)
• online forum with specialist professionals facilitating discussions and answering questions
• providing a physical space (e.g., resource centre) where staff can access resources and receive in-person support
• more frequent conferences and workshops on the topic of complex needs

Overall Considerations
• centralized coordination to act as a reference source for information about available training and to foster a "community of practice"
• increased collaboration among service providers and between service providers and postsecondary institution to increase the accessibility of existing training and to create more applied learning opportunities for both services staff and students
• increased standardization and evaluation to identify best practices in existing training and to design a process to ensure staff are retaining knowledge and applying skills
• increased use of online training methods to increase accessibility and efficiency of training programs and resources
• attention to workforce issues such as staff compensation and turnover that impact the effectiveness of training and the consideration of a specialist position in complex needs
• dedication of resources to ensure a collaborative approach can create training that is comprehensive and sustainable over time

Conclusions
Staff training to support individuals with complex needs is limited provincially, nationally and internationally. To move forward in developing a coordinated approach, efforts should be directed towards:
• ensuring adequate resources are secured to create and sustain new training opportunities
• centralizing coordination of disability services sector training through one main body
• standardizing training and increasing consistency in training delivery
• enhancing collaboration between service providers to reduce feelings of competition
• increasing use of online training methods and approaches

By engaging multiple sectors in the further development of a coordinated approach to training, a cross-sectorial training system could be established drawing on the expertise of a network of inter-disciplinary organizations.

Implications for Policy or Practice
The results of Phase 1 provide an overview of the current training available regarding complex needs in Alberta and identify key gaps and barriers that will need to be considered by key decision makers in the development of new training initiatives. This research has provided a model outlining 4 key components of complex needs training as well as key considerations and future directions to be undertaken in Phase 2. It has also demonstrated the need for policy development at a ministerial level to decrease isolation of human service sectors (e.g., use of multi-disciplinary teams, increased knowledge of each sector, etc.), and to promote increased collaboration and streamlining of services. Phase 1 has received strong support from professionals in community and government, as illustrated by the high level of participation in the key informant consultation process and the Complex Needs Discussion Forum, as well as interest generated from the dissemination activities conducted to date. This interest has created momentum within the sector for the development of a coordinated approach to staff training for complex needs.
through a network-governed, cross-sector approach. As intended, Phase 1 has provided the background research and the network connections necessary for key decision makers to take initial steps in the development of a coordinated approach in Phase 2.

**DIRECTIONS FOR FURTHER RESEARCH**
Phase 1 identified varying levels of readiness and priority among sectors to engage in a cross-sector collaborative approach to staff training for adults with complex needs. This training is a key priority for the Community Disability Services sector, and would be most effective if developed first within the sector, then extended to include other sectors in the collaborative approach. Future phases of this project will require further consideration of sector recommendations and examination of best practices in collaborative approaches both within and across sectors. At a ministerial level, future research is necessary to reduce the isolation of human services sectors in Alberta through examination of the benefits and use of interdisciplinary support teams as well as interdisciplinary training opportunities.

**KNOWLEDGE DISSEMINATION AND TRANSLATION ACTIVITIES**
Information regarding the initiative and current findings have been disseminated through presentations of project findings at the CRGI Found in Translation event April 18, 2011 in Edmonton, the Complex Needs Discussion Forum May 19, 2011 in Calgary and to the Vecova Services Leadership Team on June 21, 2011. Project dissemination materials, such as the poster developed for the Found in Translation event, have been provided to the Board of Directors for the Calgary Region Community Board Persons with Developmental Disabilities (PDD Calgary), and to the Vecova Board of Directors. Information about the initiative was also included in the 2010-2011 Vecova Annual Report.

Interim reports were provided to participants at the Complex Needs Discussion Forum, and copies of the final Highlights Summary report were provided to all participants as well as community members expressing interest in the initiative.
**Principal Applicant (Team Leader)**

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<tr>
<th>Name</th>
<th>Position Title</th>
<th>Topics of interest</th>
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<tr>
<td>Joan Lee</td>
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<td>Disability services, effective staff training, complex needs.</td>
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**Project Partners (Team Members)**

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<th>Name</th>
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<tr>
<td>Kathleen Worton</td>
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<td>Principle investigator (recruitment, data collection, data analysis, data synthesis, reporting and dissemination)</td>
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<td>Calgary Region</td>
<td>Committee (Vecova, Calgary Scope Society, PDD Calgary, Community Living Alternative Services, Excel Society, and Supported Lifestyles.)</td>
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**Publications and Presentations**

**Presentations**


**Publications**


ABOUT THE ALBERTA ADDICTION AND MENTAL HEALTH RESEARCH PARTNERSHIP PROGRAM

The *Alberta Addiction and Mental Health Research Partnership Program* is comprised of a broad-based multi-sectoral group, representing service providers, academic researchers, policy-makers and consumer groups, working together to improve the coordination and implementation of practice-based addiction and mental health research in Alberta.

The mission of the Research Partnership Program is to improve addiction and mental health outcomes for Albertans along identified research priority themes, by generating evidence and expediting its transfer into addiction and mental health promotion, prevention of mental illness, and innovative service delivery.

The Research Partnership Program sets out to increase Alberta’s excellence and output of addiction and mental health research findings, and to better translate of these findings into practice improvements.