

# **Improving your Training Curriculum and Delivery**

[pause]

**0:01:27 Cherita:** Hello, everyone, we'll be starting shortly. Please hold on.

[pause]

**0:01:53 Meradith:** Good afternoon, everyone. Thanks so much for your patience. We were getting ready to get started and my phone wouldn't come off mute so, that was awkward. Thanks, everyone, so much for joining us today. My name is Meradith Alspaugh and I am joined here by Chris Pitcher, my colleague from ICF and you are here for the, Improving Your Training Curriculum and Delivery session. So, we are very excited that you joined us today. We are looking forward to the next hour of talking about some tips and more information about training curriculum and delivery. So, before we jump all the way in, though, I do need to do a couple of housekeeping items. We are recording this session. It will last approximately 60 minutes. There will be a link to the recording and the presentation slide posted to the HUD Exchange in the very near future. During this session, everyone is in listen-only mode. However, please feel free to submit questions at any time using the Q&A box. I think it's over on the right-hand side of your screen there. We will be answering questions throughout the session. We might save some for different parts of the session if we know we're going to come back to it, but we'll do our best to get those answered.

**0:03:21 Meradith:** If you don't get your question answered, if you have a community-specific issue, don't forget you can always submit through the AAQ desk on the HUD Exchange. Also, if you're having any trouble hearing the audio through your computer, please use the chat box and our wonderful support team here will work with you on getting you the phone number and getting you connected into the session.

**0:03:52 Meradith:** Just want to start really quickly here with a quick overview of NHSDC. I believe you're probably all familiar with NHSDC but just really quickly, the National Human Service Data Consortium is an organization focused on developing effective leadership for the best use of information to manage human services. Typically, the NHSDC group sponsors two or holds two conferences every year, as we all know. In these different challenging times, the spring April session that was planned for Minneapolis has been rescheduled to this. So, we're really excited that you all could join us, and we can try something new here and see how this virtual NHSDC conference goes.

**0:04:43 Meradith:** You will be, like I said, be able to get the link and recordings of this from the HUD Exchange. I also believe they will be posting it to their site at [nhsdc.org](https://nhsdc.org). You're encouraged to go there, register for their email after these sessions. NHSDC is also sending out surveys so they would really appreciate it if you went to their website, signed up for email and participated in any of their surveys. Okay. So, kicking off what we're here to talk about today.

**0:05:18 Meradith:** So, like I said, we're here for improving your training curriculum and delivery session. Our goal here by the end of this session is that you'll have a general understanding of how HMIS training impacts overall HMIS implementation. We're going to talk a little bit about adult learning theory so, hopefully, you can have some basic understanding of those concepts, also some different approaches to developing training materials, different approaches to delivering training through different modalities including individualized in-person or remote training in- person or remote group learning and then, also some self-directed resources.

**0:06:05 Meradith:** Just really quickly, what I just walked through there our agenda, Chris and I are going to talk a little bit more about ourselves and then, we'll dig into the meat of our presentation today. Just want to say, too, again, please submit questions as you're going, and we will have plenty of time at the end of the session for Q&A as well. So, just really quickly, I know there's a couple hundred of you in here today. Probably, many of you have heard my voice or seen my face on the monthly sys admin call, but for those of you that haven't, just again, my name is Meradith Alspaugh, and I am a TA provider at the Partnership Center. We operate the HMIS Data Lab. We do a lot of our work with HMIS software providers, system administrators, programming. We operate SAGE so, we do a lot on the data management back-end side of things. So, not one of those TA folks that you often get to see that come to your communities and work with you directly, more back-end related but I'm very excited to have a chance to be here with you all today. I want to turn it over to Chris Pitcher who's going to introduce himself and then, take it over from here.

**0:07:20 Chris:** Thank you Meradith and welcome everyone. I see some old friends and some new friends here that have joined us today. I really appreciate it. My name is Chris Pitcher, I work for ICF, I am a HUD technical systems provider, I have been providing TA for 11 years now and I am, unlike Meradith, not in the back end. I often come up to your communities and say, Hey, so we have a nice compliment here. Meradith knows a lot of the stuff around the back end, and I come up and I get to see and talk to a lot of you about how you do your training, and that's what we're going to focus our energy on today. Before we get into the content, let's see who we got here. So, I got a few polls up-front to kind of set the tone. So, the first question is Who are you? Who's in the room today, do we have folks that are representing HMIS leadership from an HMIS lead, HMIS system admin? Do we have our CoC folks? Are there folks from the team of care, whether it's a data community chair, or just someone, a CoC board member, who wants to see what's going on? How about HMIS users and other. I have no way for you to tell me what other is but you can select that. Let's just give it a second here.

**0:08:37 Chris:** Alright, looks like our answers are slowing. Can we produce the result of that poll, and it looks like to me, the vast majority of folks are here, not surprising Meradith, are folks from the HMIS leadership, HMIS leads, HMIS system admin folks, since that's who we're targeting, that's who we are looking to focus these sessions on, so that's great, but I am glad to see that we do have a few folks from CoC and a few HMIS users, and then a couple of others that don't fit into the boxes that we've drawn for you.

**0:09:05 Chris:** Let's go to the next poll. So, we want to know a little bit about where you are today, as far as what your training is in your Continuum of Care. So, the question is, how effective do you think your HMIS training is? Is it effective? Is it ineffective, is it efficient or is it amazing? And obviously, we want to have a lot of folks say amazing because we might be able to glean something from you as community partners. So, let's give that a second.

[pause]

**0:09:49 Chris:** Alright, it looks like this is off afloat. Let's go ahead and publish these results. So how effective do you think your training is? Looks like 14% said completely ineffective. So, this actually ought to be pretty useful to you guys. We have 36% saying It's efficient, 45% saying it's effective and only 3% think it's amazing. So, most everyone's here to learn a little bit about how we can improve our training delivery, or curriculum, maybe the modalities that we do our training via.

Excellent, let's do our last poll and we want to hear a little bit about how you are conducting training right this moment. So how are the majority of your HMIS training being conducted now in your Continuum of Care? And this question is different than when we asked it for the session live because many of you probably due to stay-at-home orders or the pandemic are doing remote, remote training now, but that might not be what you typically do. So, let's let the answers roll in.

**0:11:01 Chris:** Alright, it looks like those have slowed, so let's go ahead and publish those results. Looks like we have pretty much a dead tie for around 23% for folks who do it all in person, or do it all remote about 10% of folks do pre-recorded remote and the vast majority of folks, 41% do hybrid of both, in person and remote, which these days obviously due to the pandemic many of us are going to a remote training situation. We're going to talk about all those different modalities and also some adult learning principles that might help us figure out ways that we can also train. So, we're going to leave the poll now and get into the actual content delivery of this session.

**0:11:45 Chris:** So why is HMIS training so important? A basic fundamental question. Obviously, training is a key component to a healthy HMIS. Without folks being trained, we're not going to have any level of consistency or accuracy. It drives our data quality as well. So, what are we training our users to do? Oftentimes, we're viewing or accessing data in HMIS, we're entering data which is what a lot of folks are doing generating reports and some folks are just analyzing data. So, it might need training that address all those different components. A strong training and delivery plan is going to give us lots of benefits, specifically improving data quality. One of those components of data quality is consistency. We get consistency in our data by making sure that everyone is collecting... Entering that data in a consistent manner. So that is obviously a very key important part of training, is making sure that folks understand how we collect data, how we enter data, what even the data means. Good data and training, a good training and delivery plan is also going to give us better usage of data, build that data-driven capacity or build that data management capacity again, set that consistent expectation for all of our users.

**0:13:09 Chris:** Meradith's going to talk about this in a little bit different and a little bit later. Excuse me. Adults learn differently than children and adults don't all learn the same way. Meradith and I are going to ask you a poll later that we asked ourselves while we're making the session and we learned a lot about ourselves and how we work together as colleagues, based on our learning styles, and I think it's really important to remember those pieces when you're developing training that folks learn differently. Obviously, a consistent and thorough training plan is critical to help us make sure that we have the foundations we need for things like data quality. And we put this little note in here. "If you have a rotten foundation, bad training, your data quality house won't stand". It is really the cornerstone to having good data quality is making sure that folks know how to collect that data.

**0:13:57 Chris:** Remember that training isn't just limited to how to use the data system though. Much of our trainings have to do with how our CoC uses the data system. What are our policies and procedures? What are our procedures around privacy and security, those things aren't just dictated by the data system you use. So, remember that training, when we talk about all these components, there's also a piece that's very specific to your CoC, you're going to have to make sure folks get trained on. Meradith, I'm going to pass it off to you.

**0:14:30 Meradith:** Great. Okay, so let's spend just a couple of minutes talking about adult learning theory. And this might not be something that many of you have really thought about in the development of your training and curriculum plans. And, it's one of those things, and like Chris was

saying, we don't necessarily always stop to think about how different people learn things differently. So, we think it's a really good idea to sort of build the foundation around adult learning theories and sort of take a look back, take a step back and look at how you are implementing your trainings, what your training content looks like etcetera.

**0:15:06 Meradith:** So just a couple key points here. And if you want to dive deeper into adult learning theory, there's a ton of information online for you. I encourage you to go do that, if that's something that you're looking at. We're going to keep a pretty high-level perspective here and I just want to talk about these four basic principles. And regardless of which theory you look at, these four are pretty consistent. So, the first thing that adults should have a say in the content and the process of their learning, that adults focus learning on adding to what they already know and have experience. Content should be focused on issues related to their professional responsibilities and learning should be centered on problem solving, rather than memorizing content.

**0:15:53 Meradith:** And I think that one, really, in particular jumps out at me, especially when you think about how kids learn and kids do a lot of memorization and a lot of the same thing over and over and over again, adults aren't going to learn well that way. So, if you're trying to get your users to memorize something, or you just give them a list of things and say, "here's your list of things, do this". That's not necessarily how adults are going to learn best. And that might, you will find, contribute to ongoing issues with your users not potentially using the system correctly, not understanding what they're doing. And then ultimately having those negative impacts on data quality and other things like Chris was talking about.

**0:16:37 Meradith:** Also, in the sort of adult learning theory world here, there are several assumptions that can be made about adult learners. They're self-directed, they have experience, they're ready to learn, problem solving oriented and internally motivated. So again, when you're thinking of content that you are developing for your training curriculum, these five concepts here should be also in your mind, right? Like you know that the adults that you are training on using HMIS or on your policies, whatever it might be, they're ready to learn. They have the experience and they have the motivation to do these trainings. So, again, it's not the same as giving a worksheet or giving a list of things to someone to memorize and learn. These different sort of qualities about adults should also be taken into consideration and taken into account when you're developing these materials.

**0:17:39 Meradith:** One of the popular theories, the VARWK model, because we need more acronyms in our life, identifies four primary types of learners. So, there's visual, auditory, reading, writing and kinesthetic also could be called experiential or hands-on kind of learning, but that wouldn't fit nicely into our... And I just lost the word, it wouldn't fit into VARWK. So, it's important to think about these different types of learners when you're developing your materials, because you may have a booklet that you have written, it might be the best guidebook one could ever write. However, if a number of your adult learners are hands-on type of learners, or they're visual, or they need to hear have these conversations, that's maybe not the best approach to take for them.

**0:18:37 Meradith:** So, it's not that we're saying, "you must do all of these, every training you do has to have a visual, auditory reading and hands-on approach to it", but that's definitely something to keep in mind as you're sort of developing your suites of products or different types of trainings that you are meeting the needs of the different types of learners that you might have. So, I think that takes us to a poll question here. This was the one that Chris and I talked about together to figure out

what types of learners we are. So, I just want to... We want to put this one out there to learn more about what kind of learner you think you are.

**0:19:12 Chris:** And Meradith, while we wait, I can talk about our experience. When we were setting this together, I said, for me, I'm very auditory, which is why you'll email me, and I will call you back. Because I need to hear it. But you've had a very different feeling about yourself.

**0:19:32 Meradith:** Right. No, I'm a reading and writing and even like, I keep a notebook here. This is my big five-star notebook that I learned when I write things down and I can go back and read it again. So, there's a bit of that sort of experiential and kinesthetic type of learning that I like to do, but really what I need to be able to do is write it down and then go back and read it again. Okay, so it looks like we are pretty... It's interesting. We're pretty split, you can publish that if you haven't already. Cherita, thank you.

**0:20:08 Meradith:** A significant number of visual learners, and then about 28% reading, writing and hands on, very few auditory only. So, you're a unique set. But I think that's an interesting point, right? Like if you're doing your trainings with folks, and you're doing, especially now in our new landscape of remote training, if you're just getting on conference calls and talking at people, good chance most people aren't getting it. They're not auditory learners, they need to see it, they need to read it, write it, do it. And so, I think keeping those principles in mind when you're developing those trainings, they're going to be what's critical to having a successful training plan. Chris, I think that's back to you now.

**0:21:00 Chris:** It is. And thank you, thank you very much. My slide just popped on me there. So, we're going to talk about developing the curriculum. What do your users need to know? Not every user needs to know everything. Many of us train by roles, but there are certainly things that, when you're developing your curriculum, you want to consider. So, we're going to talk about those things, but mostly in the form of, what different types of training might we offer? There are a few questions you might want to ask yourself as you get ready to develop your curriculum.

**0:21:31 Chris:** Who establishes the training requirements? Is that something that the HMIS lead, or maybe a certain staff person in HMIS lead is in charge of? Does your CoC or HMIS governance, does that tell that you actually need to go to the data committee to change your training? There are many different ways to figure out who establishes it, but ultimately, someone needs to do the work. How often are those policy and requirements reviewed and updated? HUD tells us that almost all of our documents should be updated annually. Let's look at our policy procedures, look at our training plans.

**0:22:02 Chris:** So how do you operationalize that? How does that work within your community? And how are your training resources accessed? Do you offer only training in a hard copy, just send people a training? Are you using remote technologies to do this, as many of us probably are at the moment, including Meradith and I at this exact moment? And maybe you're using a Learning Management System, LMS. That is something that we'll talk about more as we get into this developing training curriculum. And what we see folks doing more and more naturally is looking at things like a Learning Management System, to be able to do some content and knowledge management.

**0:22:44 Chris:** So, let's talk about the basics. What do we need in our basic training? Well,

certainly, new users. New users, as new users come on, they need to know how to use the data system. That's very clear. Is that something that you do, as the HMIS lead? Is that something you do as HMIS system admin? Is that something that your vendor provides, or a third party? So, who's doing that training? How are you identifying new users? Is there a process within your continuum to get into the training queue? Do you have to be approved by a data committee to be able to get access to HMIS? Those are things you're going to want to understand, but there are some very important must-haves in your basic training.

**0:23:27 Chris:** New user agreements. What are the policies or responsibilities that a user has before gaining access to these data systems? Certainly, no one should be accessing HMIS if they haven't been trained and haven't signed a user agreement that says what their roles are. Must-haves also include people understanding the project types. What are the target populations of services? Basic understanding of issues related to homelessness. When we talk about good HMIS users, understanding the landscape in which you work is one of the most important parts. This is a very nuanced and very interesting world, this HMIS world we've created for the last 20 years. And if you just step into it and you don't know anything about it, it could be quite scary. So, we certainly want to give folks a good basic on that.

**0:24:10 Chris:** How to enroll or exit clients? What is the data collection stages for the certain pieces of data that we need to collect for our programs? And what adding data is versus editing data, should be if you're in some sort of shared environment? And how to get help? And don't forget, policies and procedures, privacy and security. We need to know that everyone understands how those things operate in the data system.

**0:24:36 Chris:** So, let's talk about some locations and modalities. So, we kind of already asked a few questions about this, but we'll kind of talk about it in a little bit more detail. Some of the other things to consider about your training location. Is it on site? Do folks come to you? Do you go to them? That is something that we see very commonly in the HMIS world, that you'll either have a training lab at the HMIS lead and folks come in, or you go out to their location and train a bunch of folks at the emergency shelter all together. Do you use your own technology? If you don't, you probably do now.

**0:25:05 Chris:** And I think this pandemic has given us an opportunity to make sure that we have in our policy procedures, in our tool kit, a way to do trainings remotely in times that require that, like now. So, if you don't have those in your policy procedures and you're doing it, you probably want to add those in. And just say, "We also have this way of training folks." What we saw in the poll, that most folks are offering a hybrid approach. We try to train in person because some people learn that way. We try to do it remotely for other folks, or during a pandemic like this. And then again, the Learning Management System is something that we're seeing COCs go to more often these days than they have in the past. I know several COCs that have it already. We're working with Alabama and Florida to put one in place currently. So, it's definitely an emerging thing that we see folks use, is the Learning Management System, or LMS. What is your modality, doing self-directed, one-on-one, small groups? Those all take different types of training efforts. And what are the resources available? Do you have a manual or a guide? Did you have to develop that or did the vendor have to develop that? We got the basics down. Intermediate. Yeah.

**0:26:16 Meradith:** I just want to jump in real fast because I think that the question that Christina answered, which I know there's not a great way to share this with the group, but I think this is a

good point, because it's I think related to basic training. The question is, "The end users I teach range from social workers with bachelor's degrees to minimum wage shelter staff or volunteers with minimal computer experience. How do you bridge the gap for students with those different backgrounds?" So, I will chime in here and then Chris, if you want to add to that too. I think that goes back to those principles with the learning theory, and connecting the content focused on issues that are related to their professional responsibilities. So, I have a feeling that the volunteers or some of the less experienced or whatever frontline staff might have, versus the social workers that might be doing case management and have a different reason for using HMIS. Like, they have their different reasons for why they're using it. They're collecting different data for different purposes.

**0:27:21 Meradith:** And so, I think that connecting their training to their specific roles or their specific job responsibilities, is maybe a way to tailor that information to them in a way that it will be meaningful to them. Like if you just have a generic, "Everyone enter start and exit dates, everyone enter housing moving dates," like that doesn't necessarily resonate with them. Whereas the person at the shelter, helping them understand that length of stay is an important part of our measuring outcomes for performance in our shelter.

**0:27:54 Meradith:** So it's really important that we get the start date in on time, we get the exit date in on time, we get this done so that they can sort of tie that maybe a little bit more closely with the work that they do. As opposed to just saying, "Yeah, you just do it because HUD says to." So that would be one suggestion there. I think also then having those different modalities available for people to go back and reference if, let's say you do a one-on-one training where it's mostly you talking to the group, maybe having one pagers or tip sheets or something that you can direct them back to. Because again, using those assumptions that they're internally motivated, they have experience they want to learn, they may just want to go back to it after the training session is over. So, having those resources that they can take that on themselves might be really helpful. Chris, do you want to add anything to that?

**0:28:48 Chris:** No, I think that was well answered Meradith. I think you know, my general guidance as I have been a trainer in my past life as well is, meet people where they're at. Do the best you can to meet folks where they're at. I know when I was first doing HMIS training in the early 2000s in my CoC, there are folks who hadn't used, really used the computer before. But that was a whole different challenge. I had to kind of do that. And I think that thing you said that's really important is that context setting. Why is this important? Why is the data important? How does it affect? So, there's this idea of the data being interconnected between the federal partners, the system performance measures, and folks don't just understand that when they walk in the door. And once you make it important, I think training does become a little bit easier. Folks grab on to it a little bit more. It can't be understated.

**0:29:34 Chris:** We're going to do a session, I think on Thursday or Wednesday, rather, around staffing. What a healthy staffing pattern looks like? And I think one of the things I say in that session is one of the most important things I look for in a user or a system admin or anyone is, "Do you care? Is homelessness something that you want to really work in for a long time?" That passion part covers so many other holes you might have in your knowledge or your skill set, just caring. So, if you're interested in that topic, Ryan and I are going to talk about that I believe on Wednesday morning.

**0:30:07 Meradith:** S2. Let's get back into the training types. So, we're going to get into our

intermediate training. Again, who offers this, Is this you? Is this the vendor? Things get more technical, sometimes you might leverage the vendor trainings a little bit more. But remember that you still have to train on how you do things. And intermediate trainings are going to be part of that. Are there any training parts. Are there any parts of these trainings that need to be updated annually? Certainly, there are when we change the data standards every two years, you might have to change your reporting. You have to report your data collection, you might change your training to accommodate that as well. So here are a couple different types of intermediate training things that we believe is, are pretty important.

**0:30:51 Chris:** Generating reports. A lot of times we use HMIS because we need to get the data out for our funders. So, whether it is the APR, the CAPER, or my favorite report, the PATH annual report, you can definitely need to train folks on that. How to generate a CSV. Obviously, we have some federal partners that require that, the CoC and ESG programs, and even the PATH program encourage you to do CSV. So that's something that as a user, you might really need to know at intermediate level. How to generate other universal CAM reports, specifically data quality reports, folks should be able to understand data quality. That is a really important piece of the use of HMIS. Understanding the relationship between project level data and system level data in that context setting.

**0:31:38 Chris:** In intermediate, we also have that use of HMIS for coordinated entry purposes. That can often be advanced training, depending on how complicated your coordinated entry system is. But certainly, in the intermediate section, we'd want to see something like that be discussed as well. This slide is going to look a lot like the last slide for basic training. Think about your locations, think about your modalities and those resources, are you going to need to develop those or that's something that the vendor is developing. Meradith, you're going to take us through some advanced HMIS training.

**0:32:12 Meradith:** Yes, thank you. Okay, so thinking about advanced, and I think these ties again, I'm going to keep feeding this horse. This ties back to our theories like, we have advanced HMIS training that probably should be targeted towards advanced users that want to escalate their knowledge and understanding to this greater degree. Like, if you bring in sort of back to that original question, maybe some of your frontline staff or volunteer staff that are there just to feed meals, or not just to feed meals, but they're doing some short term sort of more basic tasks, so to speak, they might not be interested in these advanced trainings. So, it may not be helpful to have them do these types of trainings. So, knowing your audience, knowing what is going to connect with them and knowing what is going to motivate them to be engaged and involved is going to, again, be something to think about when you're designing this training curriculum and you're thinking about who's going to get what types of training.

**0:33:19 Meradith:** So, with the advanced training, we're thinking more like creating custom reports and doing that higher level of data analysis. So really getting much more sort of into the data, into the database and doing that additional level of work. I think it's going to be important to think about, who's doing what here? Is the vendor offering different types of trainings or is the HMIS lead the one responsible for these trainings? And as the lead you may want to work closely with your vendor to see what type of resources, they do have available for these more advanced trainings.

**0:34:01 Meradith:** It's also going to be important for these trainings that are for the more advanced users, to think about minimum length of time as an HMIS user, pretest or other prerequisites. I

know, for our system, we have an advanced HMIS training that we do for users that have been using the system for at least six months. They have to do a Intro to Report training before they would be considered for the advanced training. We call it the Advanced Training Academy. They have a quiz that they have to test because they really want to... We want to make sure that those folks that are moving to this last level of advanced training are prepared to have a useful experience. We don't want to put people into this training that are struggling to turn their computer on. They may want to be in that training, but it's not going to be an effective training if you were working really hard on those basics of making sure that you know how to enter and exit a client or do those more simple things.

**0:35:08 Meradith:** It's similar to what Chris was saying before. It's going to be important to think about how you are administering these types of advanced trainings. Are these on-site, are they a hybrid approach or remote? It's been our experience with these trainings that that sort of hands-on approach is much more effective, and doing the actual analysis and doing the actual building out of these custom reports together so that you've got the trainees and the trainers that are working closely to do this in real-time, like building reports in real-time. That's the other consideration to think about with these advanced trainings. You're going to need more time. We're not talking about an hour-long WebEx training or something. We're talking probably more like a half day or longer, really trying to get in there and do that hands-on learning and within the small group or one-on-one. And again, for use sysadmins, make sure that you're connecting with your vendors to see what resources they may already have available to you for these purposes, for these advanced types of sessions.

**0:36:22 Meradith:** I think the last one here, we want to make sure we talk about too, is the existing user training, so like ongoing user training. I think that most CoCs that I've interacted with, they do have ongoing training. Chris was talking about this earlier, too. With every two years, at least, the HMIS data standards are going to get updated. What impact does that have on your system? We've actually seen a few times where there wasn't a good training plan in place when the data standards change, and we see those AAQs come in and we see, "Oh my gosh, what do I do?" "Where do I put this data?" "It's not there anymore." "That field is gone." "That, this is gone." And, "I don't know what to do." And so, having that plan in advance for that ongoing type of training is going to be really helpful to your users in keeping their baseline knowledge the same. You don't want to get a good system in place, everyone's cruising along for about a year and a half and then, the data standards change and no one can do their data right. So, it's going to be really important to have that planned out.

**0:37:32 Meradith:** Similarly, vendors I know are releasing new features very frequently, so... Or there's a time like this where there's unfortunately a pandemic and I know that the vendors are putting screening tools out into systems, they're putting new fields out into systems. There's a variety of different things that are changing right now in the environment that we live in, and making sure that you've got a clear plan on how you're training all of your users on those points is going to be really critical to your success. Because if you just launch new fields and you just launch new assessments and new forms and people don't know what they are, they're not going to get filled out correctly. And so, you may have to modify the way that you're doing your training in these ever-changing times. You might not have the ability to do your small group, bringing people together, probably not in-person [chuckle] So, how can you reach into your toolbox and look at one pagers or tip sheets that you maybe send out, but then follow-up with a phone call or follow-up with a webinar, so that you can actually have that interaction with folks.

**0:38:38 Meradith:** Or, this is where an LMS would be really helpful, too. So, you have that resource library of different places or different documents and guides and tools for folks to use. I think I talked through these. Sorry, I went a little bit out of order there. Okay. Let's pause for a second. I think there might be a question we want to talk about before we move into, actually, implementation. Chris, is there something you wanted to...

**0:39:09 Chris:** Yeah, yup. There were two questions that came in that I think are good to ask at this moment and... Laura wrote in and said she's not sure if other folks are having this problem, "Struggled to get users to understand the nuances of the software they use. Our HMIS software has become quite complex, as you know. I can train and retrain on how to complete a workflow, but it gets messed up because of the system requirements. This has made it difficult by the fact that users don't access the system every day and they don't get that daily practice." So, is there any guidance you would give to Laura in that situation?

**0:39:44 Meradith:** That's a good question. I think that if there's something unique to your software, I think talking with your software provider, and then seeing what resources they might have available to you could potentially be one option. They may have standard kind of can guidance or they... Maybe, in your agreement with them that they provide that for you. So, I would talk to your vendor about that. I think, two, and I meant to say this earlier. I think there was another question about modality and how do I know which one to use and it's not practical to do different trainings for every single person. Maybe you can do a survey of your community and maybe you can have a focus group or use your HMIS, most places have like a work group. Figure out what's going to work well in your community.

**0:40:32 Meradith:** If you're a large balance of state, absolutely, you're not going to be able to do like one-on-one, face-to-face trainings all the time, even under the best of circumstances. So I think that looking at a sub-committee or some sort of task force that's looking at what kind of training works for your community, and serving them, and we're not saying like, "Throw out all your training materials and start over." But maybe there's some improvements that can be made based on feedback that you get from your community. I would also love, if other people had feedback. If you, to Laura's question here, specifically, I know we don't have the best way of exchanging and making this interactive right now, but if you have suggestions, you could put those in the Q&A and we can send a response out to everyone so that you can see those responses too.

**0:41:28 Chris:** Yeah, I'm going to make a statement, I'll ask you one more question. So, Christina also wrote in and said that she offers a step-by-step walkthrough of a typical entry in a PDF with screenshots that she gives to new users with their credentials, allows them to remind themselves of the workflow. So that may help you Laura but may not. The last question I can see at the moment is from Aaron, and writes in it says, "Is there any guidance on having annual certification trainings? Like trainings to maintain access to HMIS." They've been thinking about that, but not sure what would be useful to include. So, any thoughts on that Meradith?

**0:42:05 Meradith:** So, I can tell you what our experience has been. I don't know what others, but I know at one point we had what we were calling plus hours. So, we didn't do a certificate project or process, we rather said, "You need to take at least six credit hours." Kind of a continuing education process, really, it wasn't a certificate, but you had to do your plus hours throughout the duration of the year. Which, at the beginning, sounded like an awesome idea. And I think that there's some real

merit in there. But I think the thing to think about with that is the maintenance of it, because if you're going to make the requirements that your users have all of these hours of training, or they get a certificate, which are all great ideas.

**0:42:54 Meradith:** You have to look at what your capacity is, to make sure that happens also. Because we found for our hundreds of users, it was a real challenge to offer enough training, that were meaningful, that let people get their hours. So, I would just caution you to think that process through, and I think then that's where you're going to think about your modalities. Like if you have a pre-recorded... Which it didn't look like most people did, if you had a pre-recorded session, then maybe that's one way that they could check those boxes and say that they did those pre-recorded sessions, and that wouldn't take a ton of your staff capacity to get that done. But if you're going to make them do face-to-face or small group, think about the capacity impact for you and your staff.

**0:43:38 Chris:** Yeah, and I'll just say this, Pat wrote in also with a good point that "using your data quality information to target those users that are causing you poor data quality or are clearly not entering data correctly, is a good way to do a new refresher as well". So, thank you for that tip Pat.

**0:43:54 Chris:** I'm going to move it forward to the curriculum implementation. So, we need to develop the curriculum, but then we need to do something with it, and this is kind of some of our thoughts on what you can do with it. This is going to get a little bit deeper, some of the things, but Meradith and I have already kind of touched upon. So again, developing the curriculum, this is the first step; You need to actually do the training. Rubber hits the road here. Implementation of consistency thorough training leads to HMIS success. You get better data quality, you get better users, all sorts of good stuff happens, and we have different ways that these happen nationally. We have HMIS leads doing training, we have the train the trainer model, you train someone that means well, maybe a agency administrator or something like that, and they actually train the folks below them.

**0:44:40 Chris:** The vendor, a lot of vendors are offering training, as they should. They are the ones after all that have the software, that you're using, and we have seen some third-party trainers, that just do HMIS training nationally. I know myself, back in the early days, in the early 2000s, I did lots of training in Virginia and Maryland for other CoCs that didn't have staff and kind of worked that way. So that is also a route to go, if you just need a trainer. And training isn't for everybody. Some people are really good at it and some people really struggle with it. And it's scary to sit in front of people and talk. So not everyone's a good candidate to be a trainer.

**0:45:17 Chris:** Some of the modalities that we have talked about, but I'll get into a little bit more detail, obviously, a lot of us focus on in-person trainings. Because when folks can separate themselves from their day-to-day work, when they can sit down and look at something, they're more likely to remember something. Obviously, this is not the case for all adult learners, as we talked about. There's lots of different types of adult learners.

**0:45:40 Chris:** Logistics can be very difficult and cause lack in training. We see folks saying, "You're in the queue to be trained, but it won't be a month." Well, that kind of means that maybe that's not the right modality for you, to be doing your training. You don't want folks waiting and waiting and waiting for training. That's not a way to get your data in your data system. Remote training, obviously, is what we're doing today. Typically, Meradith and I would be in front of you, in a cold or hot room, depending on the room, at a conference, but we're not, we're not able to do that.

And you're not able to train folks that way. So, whether you live at Zoom or Adobe Connect, like we're using today, doing remote training is going to be very useful. Whether that's recorded remote training or whether that's live remote training.

**0:46:24 Chris:** Again, certain users, certain learners are going to like this better than others. It can be easy to manage. This session, thankfully, we have support from Cherita and her tech team at TDA. It's pretty easy to operate. Meradith and I just talk, and educate you, while this whole system kind of keeps itself going. So, it can be easy to manage, once you learn the system. So, if you're using something complicated like Adobe Connect, you want someone like Cherita from TDA, here to have your back, in case something goes wrong. More immediate, you can be, you know, more purposeful.

**0:46:57 Chris:** Pre-recorded. Some folks prefer this. I myself struggle with pre-recorded trainings. I struggle to focus [chuckle], I struggle to stay seated [chuckle].. But it can be very useful for certain types of learners. It can be difficult to record post, edit those things. That's a different skill set we might not have. So that might be a consideration in using that modality versus not, but these often go very well with having some tests. So, watching a video and then taking a test, or getting some sort of certification to make sure that the learning actually occurred. So that is a practice that does work fairly well with a pre-recorded modality.

**0:47:36 Chris:** Next, you've heard us talk about it, maybe you even have one. A learning management system. HUD has a learning management system. We just call it HUD LMS, so it's a place where we can post recordings, we can post tests, we can do all sorts of things up there. Learning management systems, again, our friends in Alabama, and Florida are currently going through this process of identifying learning management systems, developing curriculum and then posting it up there and having folks be trained that way. This again is good for some adult learners and not others. It can be difficult to develop though. There's a lot of leg work, a lot of background to put these things together. But once the content is created, most of the management systems are pretty easy to manage. Again, this also lends itself very well-to-training tests and certificates for adult learners to ensure that the learning has actually occurred, and, you can update those content as the vendor changes the software or as the data standards change in 2022, for instance, as we know that they likely will.

**0:48:40 Chris:** So LMS again, they often are a different system from HMIS. There's something you can buy and have as part of your training package. Other modalities, written guidance: Meradith talked about written guidance, we, Meradith and I develop a lot of that written guidance that you guys train yourselves, that they get trained on, and then you have to develop that for other folks. Those could be guidebooks one-pagers just some quick tips. We've seen that as well. And then find a place where you can answer commonly asked questions or provide resources to your folks. So written guidance might be things that the vendor produces or might be things that you produce, based on maybe your local policies and procedures, that kind of thing. And that's really our in-depth on modalities, and Meradith, I believe that brings us to the end of our actual content and we have, I believe 12 minutes left.

**0:49:34 Meradith:** Yeah, and we've got some pretty great questions, that they're not really questions, but suggestions from our participants here that is making me really wish we had the ability for them to chat or talk or something, but that's okay. We'll improvise, here and we'll get through. So, I just want to read a couple of these. I did send them back out, but I just wanted to

comment on them a little bit. There were some specific tools that were referred to which is really nice.

**0:50:05 Meradith:** So, someone suggested Screen Digest or Skiff, if you will, as a useful tool for workflow. So, thank you for sharing that, Donna. Also, the folks in Alaska have utilized Captivate to record the Alaska HMIS intro training and the privacy of security training, which I think is a really great point. You're not using it for everything, you're using it for some of those, standard trainings that everyone's going to have to do, that are really policy-based. So, they have those recorded, they use it, they rigged it, so that the users have to do a quiz, and submit it via Google forms. And according to Holly, it's a huge time saver, so that's great. And then once they get into the one-on-one Webinars, their time is used for specific user workflow needs. So, I think that's an excellent example and I hope you marked the amazing section there on that earlier poll. I think that's a really good example of using different modalities and using different modalities for different types of trainings. That's a really, really great example, thank you.

**0:51:17 Meradith:** And then Katie had one from Michigan, who they've been using an LMS for the past five or six years. And she believes well worth the time to set up. They're a state-wide implementation, but their lead staff can see all users training results and local sysadmins can see their specific trainee's result. So that's really exciting. And I think I asked her which one they use, and I don't know if she responded. I haven't found the answer yet, if she did.

**0:51:48 Chris:** See if this is Katie from Michigan, says they use Joomla LMS, which requires a bit of setup... But I think she mentioned before. The setup is well worth it. So, all that work up front is well worth it in the end. So, Joomla LMS.

**0:52:10 Meradith:** Yeah, and... Just to say to Katie suggestion, I would very much support this. Do your own research too, and find out what works for you, because that has been some of the feedback or questions we've seen come through also. People, they're not sure where to start, or what to do and it's going to depend on what your system needs. Like, the Cadillac may be enticing, you may want all the bells and whistles, but if you actually just need the Taurus, right? I don't know if they make Taurus anymore but like... [laughter]

**0:52:44 Chris:** I don't think so.

[laughter]

**0:52:46 Meradith:** Ford, whatever... You know, the thing that's going to get you from here to there, if that's what's going to work for your system and for your curriculum, keep it simple. You don't need to make it super complex and complicated if that's more than what you really need.

**0:53:03 Chris:** Yeah, and Christina writes in and says that we here in Colorado, which Christina... I'm also here in Colorado, are making the case to also try to transition their training to LMS training. As I said, this is something I've seen emerge in the last two years, I knew a few CoCs doing it, but now a lot of CoCs are kind of headed that way, and really trying to set those LMS up to reduce that load of all that time training. Let's remember, the HMIS users, that's a group of folks who have a lot of turnover. So training is always a need. So, Christina, I'm glad that our state of Colorado is looking into that.

**0:53:51 Meradith:** And you all will see I'm just hitting thank you on all of these, because I don't think you can see them until we respond to them. So those of you that are sharing thank you for doing that and keep them coming in. If you have other suggestions, then Chris and I will make sure that we get those sent back to everyone so that you can see them.

**0:54:16 Chris:** It looks like there's a comment from Andrea Carey... Andrea Carey excuse me from North Carolina, I'll just read as well. For pre-recorded, we've had limited success making the videos short, like less than 10 minutes and hopefully close to the five. Testing remotely has been a challenge, even in 10 to 15 minutes is too long for some folks to retain information. Do you have any suggestions about how to make visual, audio, reading and kinesthetic testing? Meradith, I don't have an answer to that, first day.

**0:54:54 Meradith:** I don't know, and maybe one of our excellent colleagues here from our participants knows, but I know that there are software that do the testing throughout the delivery of the curriculum, so as to not make it 20 minutes of content and then a quiz at the end to make it more interactive. I do not know the specific names of any software that do that. But I think that some folks are coming in already with suggestions. We'll send those back out to you all, but that might be an option also. Yeah, so just...

**0:55:45 Chris:** Looks like we've received another platform that someone uses Talent LMS, Anthony Hart, thank you for sending that in.

**0:55:54 Meradith:** Yeah, and I think that Jeff made a good point in San Diego, they break the training up into steps. So, sort of that's kind of what I was getting at, they break it into steps, and then give them a guide for the data entry practice, in addition to the quizzes. So, I think making it into those chunks that are relatable and accessible is going to be something that makes sense for most folks.

**0:56:18 Chris:** And Kate writes in and says, asks if we have any thoughts on stepping up test clients, on training sites, and testing users by requiring trainers to go through the process? And then the trainer reviews what if the data was entered correctly? Certainly, I think that's a good hands-on technique. When I used to do training again 20 years ago, which makes me sound old, we would often either have them do test clients, or we would train them in the system and have them actually bring real client records that needed to put in and have them go to our website and actually do it hands on with me there helping them. So that's certainly a good tool, how you use it is kind of up to you. But it's definitely a good tool to have in your pocket.

**0:57:00 Meradith:** So my only thoughts on that, based on we have a user support team currently that goes out and does training and some of the feedback we've heard, and we've modified our training just a little bit is that some folks felt like, they were being set up a little bit like trying to do a little gotcha on that. And so, I think just being mindful, and attentive to the fact that they are trying to do a good job. And so I think when you set up a scenario that in real life, I can't say it's never going to happen, because we see all sorts of things happen that we don't expect, but you want to give people realistic and meaningful scenarios and test scenarios, when you're asking them to do those kinds of setups so that you're not setting people up to fail also. But I think that actually walking through and having that hands-on experience of enrolling a client, updating a record, editing a record, exiting a record, that has proven to be very helpful in most circumstances I've heard of.

**0:58:03 Chris:** Yep. [0:58:06] \_\_\_\_\_ lots of comments. I'm not seeing any questions, Meradith.

**0:58:13 Meradith:** I'm just trying to reply thanks to all of these so that we can get some of the feedback out here. You guys are doing awesome with giving us feedback. I wish everyone could see it.

**0:58:28 Chris:** John mentioned, if your HIMS can be customized to offer training within the system itself, it can be a nice option. Especially if you have an HMIS training database. I meant to mention training databases during the conversation and just lost it in my head. That is something that a lot of vendors do offer, the second data system that set up just like your live environment where you can do the testing and training which is great. And if you can customize that to do some of this other LMS stuff within it and that's also really great. And we've had a few other folks write in about some of their data systems as well, which I cannot find at the time but Litmos, I think was another one I just saw or LMS.

**0:59:13 Meradith:** Yeah. Chris, I see a question about whether the chat is available with the recording, is the chat in the recording Cherita? Maybe?

**0:59:26 Cherita:** Yes.

**0:59:29 Meradith:** Okay, good. Yeah. So yes, well, we'll make sure that you get the Q&A log here too.

**0:59:35 Chris:** And Christina wrote in and asked us out of curiosity, do we like Adobe Connect? Is there an option for chat under different settings? Yes, there is a chat option. We removed it to make it the Q&A option, so that we could actually formally respond to the questions and not lose them in chat. Because once you get the chat going, we lose questions as your presenters. But I can say for myself, I've used a lot of platforms over the years. But as long as you have a really good technical staff, like again, we are blessed to have Cherita and the TDA staff doing all the background, if you can have that, it's a very great, in my opinion, very great platform to do all sorts of stuff on. We do the community of practice, HMIS Implementation communities of practice we do through Adobe Connect, and a lot of other things. I think it's a really good tool, but you do need that technical, you can't be the technical person and the presenter. There's just too much to manage. So that's the last I was going to say on that. Meradith is there anything else you want to highlight before we wrap up?

**1:00:41 Meradith:** No, I don't think so. My mute button has given me all the fits today. I don't think so. I just would also like to say thank you to everyone and thank you for being as engaging as you can in the chat or in the Q&A, this is super helpful. And we will make sure that you get this information back out. This is some really helpful stuff and.