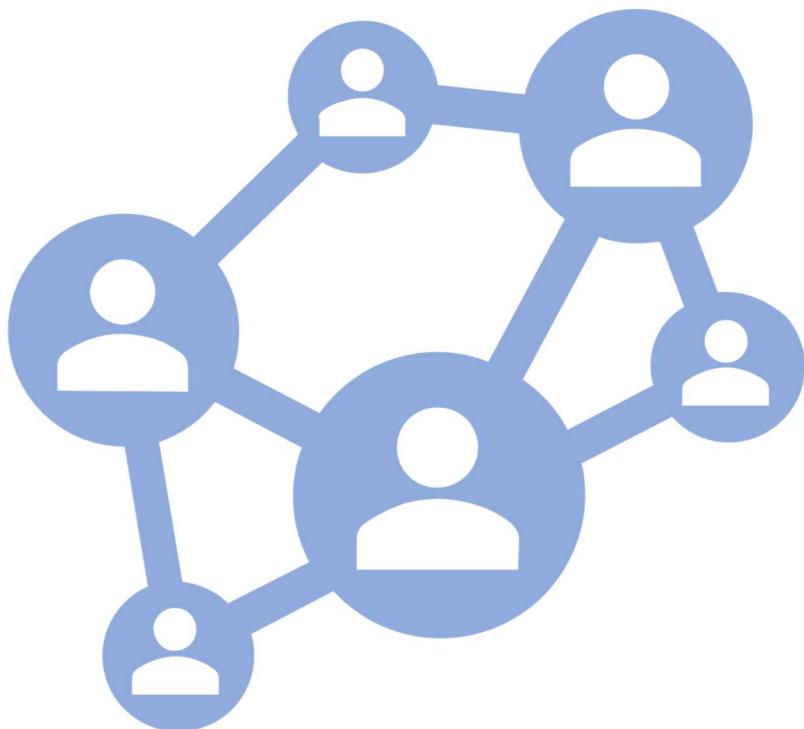


NORTH CAROLINA
CERTIFIED PEER SUPPORT SPECIALIST PROGRAM

Course/Training Review Protocol



North Carolina Certified Peer Support Specialist Program
School of Social Work
The University of North Carolina – Chapel Hill

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Introduction

As outlined in the Training Policies, all certification courses are subject to quality improvement observations during unannounced visits. These training reviews are designed to ensure that Certified Trainers (CT) follow the instructor manual as their guide during instruction. The purpose of the review is not to penalize trainers, but to identify opportunities for collaboration and support to enhance the quality of training delivery. The CPSS Training Technical Assistance Team (TAT) will conduct reviews of both face-to-face and online training sessions, as applicable.

CPSS Training Technical Assistance Team

The NCCPSS Program staff and CPSS contractors will comprise the Training Technical Assistance Team (TAT). The TAT will conduct unannounced visits to observe training sessions, both face-to-face and remote if applicable, and provide technical assistance. Certified Trainers are aware that reviewers may arrive unannounced to observe a class and must therefore inform students at the start of each session. For remote training, Trainers understand that the TAT may log in to review any scheduled class. Trainers must provide the training links in advance of the virtual class start date. To maintain the unannounced nature of course observations, remote training links must be provided directly to the NCCPSS Program and include full login information, not a registration page link.

Review Materials/Checklist

The TAT will conduct these unannounced visits. To ensure a successful and productive site visit, the Certified Trainer must provide the following items on-site for the TAT. These items include the following:

- **Updated Agenda:** An updated agenda for the day, which the TAT will use to follow along with the class. This is a requirement for all approved courses. For the Foundations Course, the agenda is included in the manual and provided to TAT members.

- **Handouts and other resources:** Copies of any handouts for class activities assigned for the day. This is required for all approved courses unless the CT of the Foundations Course has additional materials.
- **Submission of Materials:** If applicable, the Course Owner (CO) or Certified Trainer (CT) must email all materials, including the agenda, handouts, and training link, to the NCCPSS Program no later than 48 hours before the start of remote training.

Review Topics

During the observation visit, the TAT will utilize a review tool to measure the quality of the class. To help CO and CT understand the TAT review for success, below are some areas covered in the review tool:

- **Technology Use:** CT utilizes basic technology for both face-to-face and remote training, such as cueing videos, displaying and navigating PowerPoint slides, and using breakout rooms for discussions. For remote training, an additional person (co-trainer or technical assistant) must be present to handle all technical support, allowing the CT to focus on content delivery.
- **Instructor Manual:** CT uses the course instructor manual as a guide to deliver content and complete activities outlined in the teaching methods of the Foundations of Peer Support (Part II) course. Alternative teaching methods may be used to teach core concepts if deviations from the outlined methods occur.
- **Homework and Assignment Review:** CT assigns and assesses homework or assignments as outlined in the Instructor's Manual.
- **Content Mastery and Delivery:** CT displays a good grasp of the subject and uses the appropriate language to teach participants to understand the core concepts.
- **Class Engagement and Management:** CT utilizes time management skills, follows the schedule in the agenda, and allows participants ample time to process and complete activities. CT creates a safe environment that allows students to participate and feel valued in the class. In addition, CT is adaptable to the class environment and can respond to challenges swiftly.

- **Learning Environment:** The learning environment must be conducive to optimal learning. This includes, but is not limited to, ease of locating the classroom for students and TAT members, adequate resources such as chairs, tables, and internet access, and a well-lit, ventilated space at a comfortable temperature. The environment must also be inclusive, fostering a positive and safe space for collaboration and interaction among all students.

Review Process

The NCCPSS Program breaks the training review into three parts: a) before the review, b) during the review, and c) after the review. The following outlines the steps for each review section.

Before the Review

TAT reviews are scheduled based on the certification training schedule provided to the NCCPSS Program. To ensure that the TAT has an up-to-date schedule, the NCCPSS Program staff follows these steps:

- Request CT and CO submit training schedules to the NCCPSS Program and post each training on the PSS website on a quarterly basis. All training schedules must include exact dates, times, location (or remote platform), and the contact person for the training.
- Update the NCCPSS Program Training schedule when there are any changes to the schedule.
- The TAT will schedule observation visits based on the training schedule submitted to the NCCPSS Program.
- CO/CT must submit information on training cancellations to the NCCPSS Program no later than **48 hours** before the first day of the training.
 - a. In rare cases where a cancellation or change occurs due to factors beyond the control of the CO/CT (i.e., weather, broken A/C (or heat), the CO/CT must notify the NCCPSS Program of any changes ASAP.

- If applicable, CO/CT will email links to access all CPSS Remote Learning sessions to the NCCPSS Program at least two weeks before the class.
- If applicable, CO/CT will email all electronic materials used in the CPSS Remote Learning sessions to the NCCPSS Program at least two weeks before the class. These materials may include handouts and appendices if they are not included in the Trainer's Manual.
- CO/CT will provide the NCCPSS Program's telephone number and email address to all training participants to allow them to provide positive or negative feedback regarding the online training.

During the Review

The TAT may be conducted face-to-face or virtually.

Face-to-Face Training: If the TAT is reviewing face-to-face training, the following guidelines will be adhered to:

- The NCCPSS Program TAT staff and/or contractors will arrive early to introduce themselves to the CT and be reassuring, emphasizing the review's nature.
- The TAT will let the trainers decide how to introduce the reviewers to the group, or they can let them introduce themselves.
- The TAT will introduce themselves to the group and explain why they are there, but they will sit outside the group and not participate. They will strive to be unobtrusive.
- The TAT may go back for further observation if needed.

Virtual Training: If the TAT is reviewing a training virtually or remotely, the following steps will be adhered to during the review:

- The TAT will follow the same protocol as face-to-face training.
- The TAT will introduce themselves to the group.
- The TAT will explain that they will not be displaying their camera during the training to conserve bandwidth and remain unobtrusive and turn off their camera after this explanation.

After the Review

Upon completion of the review, the TAT will complete a review report.

- The TAT will not give feedback on the training day, only information about the next step in the process.
- The TAT will send their completed observation checklist to each other within two business days.
- The TAT will submit a narrative report based on the observation to the TAT lead within seven business days after the review.
- The TAT lead will review and forward the report to the NCCPSS Program.
- The NCCPSS Program will send the report to the CO/CT within two business days after receipt and offer a follow-up call with the reviewers.

Addressing Review Report Questions

If a CO/CT has questions about the review report and reaches out to the NCCPSS Program, the following steps will guide the development of a response to the CO/CT:

- The NCCPSS Program staff will forward the question to the TAT that completed the review within one business day.
- The TAT will meet and develop a response to the course owner and copy the NCCPSS Program staff within five business days.
- The NCCPSS Program staff will follow up on any requested information within the time stipulated in the review report.

Introduction Script

To the Certified Trainer(s):

Hello, I am _____, and I work for (or I am a contractor) with the NCCPSS Program. I am here today to observe this training, as it has been approved as a certification course for individuals seeking to become Certified Peer Support Specialists. We do this for all Approved Courses in North Carolina, not just for this class. Please note that our purpose is to observe how the Approved Course is taught in the community, not to evaluate you as a participant. Within the next week or so, we will give feedback to the

NCCPSS Program, which will be shared with the Course Developer. In the meantime, enjoy the class!

Modification of NCCPSS Program Course/Training Review Protocol

The NCCPSS Program reserves the right to amend and modify the Course/Training Review Protocol. When the NCCPSS Program makes any changes, the Program staff will post all changes on the PSS website. The Program staff will notify all Course Owners by email of the changes made and when they take effect.

If you have any concerns or questions, you may submit them to:

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