

Creative and Meaningful Education – Building Nursing Competencies

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MOMENTUM
2023 ANNUAL MEETING & EXPO
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Convention Center - Schaumburg, IL

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Objectives

Upon completion of this presentation, participants should be able to:

- Identify the elements of competencies and evidenced base education to develop skills
- Develop a facility plan to implement competency-based training
- Describe key strategies for nursing leadership to operationalize the training process.

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Education Journey



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Elements of Competencies

Strategic initiatives and priorities

Marketplace trends and initiatives

Regulatory requirements

Workforce trends-current and future needs

Training program staff and deployment based on needs

Facility specific training program objectives

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Requirements of Participation

- F725 – Sufficient Nursing Staff
- **F726 – Competent Nursing Staff**
- F727 – RN 8hrs, 7 days/week, Full Time DON
- F728 – Facility Hiring & Use of Nurse Aide
- F729 – Nurse Aide Registry Verification, Retraining
- F730 – Nurse Aide Performance Review – 12 hours/year In-service



https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/lcm107ap_pp_guidelines_1c1.pdf

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Competency - Definition

"A measurable pattern of knowledge, skills, abilities, behaviors and other characteristics that an individual needs to perform work roles or occupational functions successfully"

All nursing staff must also meet the specific competency requirements as part of license and certification requirements defined under state law or regulation.

https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/lcm107ap_pp_guidelines_1c1.pdf

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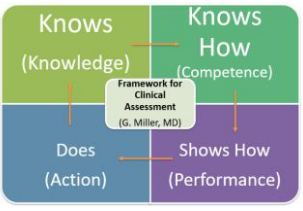
F726 Competent Nursing Staff

- Competencies and Skill Sets Necessary
- Competency
 - Measurable pattern
 - Identified knowledge, skills, abilities, behaviors
 - Aligned with work roles
 - Meeting resident population needs
- Accordance with facility assessment



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Competency




Framework for Clinical Assessment
(G. Miller, MD)

https://open.umich.edu/sites/default/files/downloads/020-2-113-ms-coursere-imlpe-cstalburo-millers_pyramid_cleared.pdf

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Overall Goal

- Evaluate ability
- Ongoing
- Prevent negative outcomes
- Provision of care



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Mandatory Training (RoP)

- Preventing and reporting abuse, neglect, and exploitation
- Dementia management
- Infection Control
- Competencies related to an approved nurse aide training and evaluation program
- Medication management
- Change in condition
- Resident rights
- Person-centered care
- Communication
- Basic nursing skills
- Basic restorative services
- Skin and wound care
- Pain management
- Cultural competency
- Behaviors and TIC



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Change of Condition-All Staff

All staff will need to be aware of the facility protocol for identification and communication of a resident with an early, acute change of condition in order for the nurse to evaluate and provide approaches to prevent resident decline or hospitalization whenever possible



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F730 – Regular In-Service Education

- Facility must complete a performance review of every nurse aide at least once every 12 months and provide regular in-service education based on the outcome of these reviews
- Each nurse aide must have no less than 12 hours of in-service education based on their individual performance review
- Calculate the date due by the employment date rather than the calendar year

https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/lom107ag_pp_guidelines_1ed.pdf



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Training Requirements

- F940 - General
- F941 - Communication
- F942 - Resident Rights
- F943 - Abuse, Neglect, and Exploitation
- F944 - QAPI
- F945 - Infection Control
- F946 - Compliance and Ethics
- F949 - Behavioral Health Trauma Informed Care



https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/cms127ap_49_guidelines.pdf

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2022 ANNUAL REPORT



Facility Training Program

To ensure any training needs are met for:

- New Staff
- Existing Staff
- Individuals providing services under a contractual arrangement
- Volunteers



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2022 ANNUAL REPORT



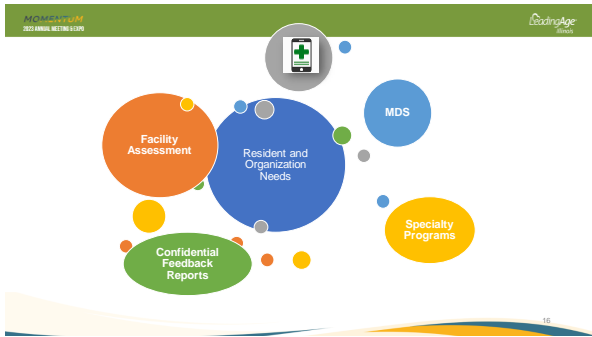
Step 1: Resident Population

Step One



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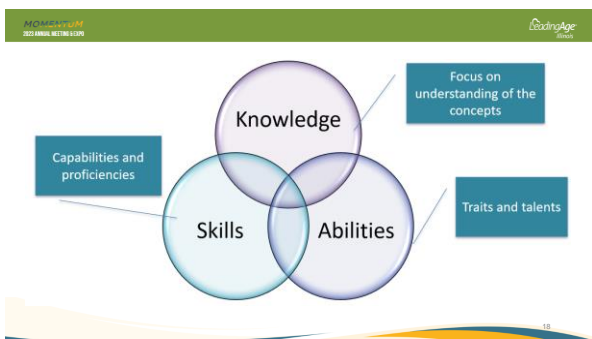
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Assess - Capabilities & Competencies

- Determine a process – assess
- Assess with role/responsibilities
- Licensure and certification alignment
- Assess current status
- Disease state competencies
- Coordination with Medical Director (input)
- Assess status with mandatory competencies
- Assess technology competency
- Right people in the right roles



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Other



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Identify Gaps – Possible Strategies

- Data gathered
- Determine individual and organization root cause
- KPI's
 - Organization
 - Individual evaluation
- Employee assessments
- Observations
- Orientation, Annual, Ongoing or Change



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Competency Determination

Step Three



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- Identify Gaps
- Determine Competencies Needed
- Prioritize Competencies
- Develop Education
- Evaluate



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Provider Considerations

- Facility Assessment
- Knowledge of local culture
- Beliefs about what consumers value
- History / reputation in community
- Availability of continuum of care
- Education, competency, skills of staff
- Evaluation of facility training program for staff and volunteers
- Human resources
- Compliance, ethics and HIPAA
- Insurance contracts – who can you take



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Additional Clinical Considerations

Position Responsibilities for RN and LPN/LVN

- Foundational Clinical Areas
- Change of Condition*
- Treatments (i.e., IV, Wound, others)
- Infection Prevention and Control
 - Outbreak Management
- Cultural Competence
- Trauma Informed Care



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Additional Clinical Considerations

Position Responsibilities for RN and LPN/LVN

- Medications
- Fall Prevention
- Pressure injuries
- Specialty Programs
- Resident Rights
- Abuse Prevention



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Additional Clinical Considerations

Additional Basic Nursing Skills such as:

- Infection
- Incontinence
- Weight/Nutrition
- Mood and behaviors
- Device use
- Psychotropic medications
- Medication reconciliation



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Additional Clinical Considerations

- Assessment skills
- Care plan development
- Neurological evaluation
- Cardiovascular
- Respiratory
- Musculoskeletal
- GI
- Sleep patterns
- Oral/dental
- More



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Additional Clinical Considerations

- Person Centered Care
- Communication
- Restorative nursing
- Pain management
- Disease state management
- Preventable readmissions




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Additional Clinical Considerations

- Alignment with resident population and organization data
 - Acuity
 - Demographics
- Continuum or partner expectations
- Marketplace needs and expectations
- Leadership/supervisory skills



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Competencies

- Job Description
- Scope of Practice
- Needs Assessment

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[illegible]

MyCompetencyHub
Building Skills for Success

LeadingAge
Health

Job Category

Questions:

- New Policies and Procedures
- New Equipment
- New Specialty Program
- New initiatives
- Changes in P&P
- High Risk aspects of this job category (cause harm, death, legal, risk)
- Problematic aspects of the job category (incident trends, organization data trends, outcomes of evaluation, etc.)

Competency Need	Priority			Action Steps
	high	Medium	Low	

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[illegible]

**Develop a
“Needs
Assessment”
for each
department**

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[illegible]

Step 4: Competency Based Training

Step Four



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Training Program Components

- Individual plan and Organization plan
- Orientation/Onboarding
 - All employee
 - Nursing
 - Contract
 - Vendor/Volunteer
- Organization specific identified areas
- Skills verification based upon job category
- Mandatory training (Federal/State/Corporation)
- Specialty program specific training
- Facility specific
- Identified competencies, gaps, opportunities



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Competency Based Training Program

- Orientation specific skills checks and competency verification
- Evaluates current training program
- Gap identification
- Outlines need
- Aligned with facility assessment
- Training agenda, outline and objectives
- Tracking system
 - Assess
 - Plan
 - Implement
 - Evaluate
- Modalities



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Curriculum

Regulations

Best practice

Organization/business needs

Policies and procedures

Population needs

Staff Needs

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Training Plan

Training Reference

Centers for Medicare & Medicaid Services State Operations Manual, Appendix PP – Guidance to Surveyors for Long Term Care Facilities (Rev. 208, 10-21-22): https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/som107ap_pp_guidelines_ltcf.pdf

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Determine HOW Education will be delivered

In person

Web based – Commercial or others

Conference

Skills fair

Lecture and demonstration

Mini bytes or chunk type training (TED talk formats)

Pod casts

Video messaging

Self-Directed Platform

Gamification - gaming

Role Playing

Case Study

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Determine Need and Educate!

Heart Failure (Example)

- Description
- Classification
- Right Versus Left Sided Heart Failure
- Presentation
- Nursing Interventions
- Significant Lab Values
- Symptom Management
- Dietary Interventions
- Respiratory Interventions
- Medication Management
- Practitioner Communication



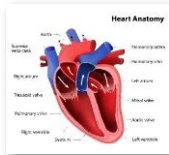
Excellent Reference!

American Heart Association
Classes of Heart Failure:
<https://www.heart.org/en/health-topics/heart-failure/what-is-heart-failure/classes-of-heart-failure>

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Training Plan (Example)



Training Plan - Heart Failure	
Topic	Heart Failure
Objectives	<ul style="list-style-type: none"> 1. Define heart failure. 2. Describe the pathophysiology of heart failure. 3. Identify the signs and symptoms of heart failure. 4. List the risk factors for heart failure. 5. Discuss the management of heart failure.
Activities	<ul style="list-style-type: none"> 1. Lecture 2. Case study 3. Role play 4. Group discussion 5. Quiz
Assessment	<ul style="list-style-type: none"> 1. Written test 2. Oral presentation 3. Role play 4. Group discussion 5. Quiz

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Post Test Example

Develop your own test based upon education! Here is just an example



Post Test - Congestive Heart Failure (CHF)

Questions

1. True or False: Heart failure is a physiologic condition in which the heart cannot pump enough blood to meet the body's needs for blood and oxygen.
2. Heart failure develops over time. Which of the following is NOT an initial compensation technique of the heart when it is unable to keep up with its own workload?
 - A. Heart enlarges to pump more blood
 - B. Heart muscle gets bigger to pump more strongly
 - C. Heart pumps slower
3. List three symptoms of heart failure:
 - A. _____
 - B. _____
 - C. _____
4. For the following statements, write T if the statement applies to left-sided heart failure and R if the statement applies to right-sided heart failure:
 - A. _____ Usually occurs first
 - B. _____ Heart loses ability to pump as strongly and fluid backs up in feet, ankles
 - C. _____ Ventricle becomes weakened and loses its ability to contract normally. The heart can't pump with enough force to push enough blood into circulation.
 - D. _____ Ventricle loses the ability to relax between contractions. The ventricle can't fill with

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Example – Return Demonstration

Example: Lung sounds: (Simulation devices are wonderful if possible!)

- Gathering equipment
 - Confirming identity
 - Hand Hygiene
 - Auscultation
- Location



Excellent Reference!
American Heart Association
<https://www.heart.org/en/health-topics/heart-failure/what-is-heart-failure>

Description of normal breath sounds

Description of abnormal breath sounds

- Crackles/Rales
- Rhonchi
- Wheezes
- Pleural Friction Rub

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Example

[illegible]

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Example

Skill Area	Evaluation (Check One)	Method of Publication (Check One)					Verification (Provide Date)
	Competency Demonstrated	Results Training	D	O	N	Y	
Change of Conditions (0007)	<p>Neurological Assessment</p> <ul style="list-style-type: none"> • Posture • Gait • Balance • Motor Function • Sensation • Pain <p>Resuscitation</p> <ul style="list-style-type: none"> • Breath Sounds • Oxygen Saturation • Heart Rate • Blood Pressure • Spinal Cord <p>Cardiovascular</p> <ul style="list-style-type: none"> • Heart Rate • Blood Pressure • ECG • Oxygen Saturation • Respiratory Rate • Pulse Rate and Rhythm 						

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Example

Evaluate and Monitor

Individual Training Program Evaluation Summary

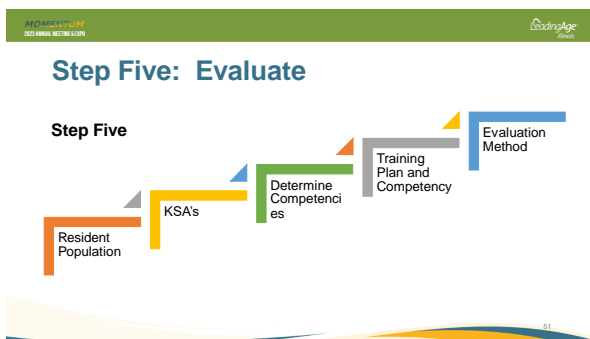
Education Topic	Method of Teaching	Date of Education
Instructor	Training Methodology (Classroom, Self-Directed, etc.)	Training Materials (Handouts, etc.)
Course Description	Learning Objectives	
Objectives		
Standards - Attached	Verification of Evaluation Conducted	
1. Did you attend? 2. Did you participate? 3. Did you understand the content? 4. Did you receive the necessary materials? 5. Did you receive the necessary information? 6. Did you receive the necessary feedback? 7. Did you receive the necessary support? 8. Did you receive the necessary resources? 9. Did you receive the necessary information? 10. Did you receive the necessary feedback? 11. Did you receive the necessary support? 12. Did you receive the necessary resources?	1. Did you attend? 2. Did you participate? 3. Did you understand the content? 4. Did you receive the necessary materials? 5. Did you receive the necessary information? 6. Did you receive the necessary feedback? 7. Did you receive the necessary support? 8. Did you receive the necessary resources? 9. Did you receive the necessary information? 10. Did you receive the necessary feedback? 11. Did you receive the necessary support? 12. Did you receive the necessary resources?	
Evaluation Results: 1. Did you attend? 2. Did you participate? 3. Did you understand the content? 4. Did you receive the necessary materials? 5. Did you receive the necessary information? 6. Did you receive the necessary feedback? 7. Did you receive the necessary support? 8. Did you receive the necessary resources? 9. Did you receive the necessary information? 10. Did you receive the necessary feedback? 11. Did you receive the necessary support? 12. Did you receive the necessary resources?		
Evaluator	Date Completed	

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For All Education Programs

- Staff attendance and sign in compliance
- Documentation of training sessions
- Training plans
- Curriculum
- Calendar
- Competency verification
- Post training review
- Observation
- Engage and collaborate with staff – creative/SME
- Incorporate into professional development plan of employees
- Employee files for all training documents per policy
- Review education attendance routinely for compliance
- Evaluate effectiveness of individual training
- Evaluate effectiveness of overall training plan
- QAPI/FA

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Evaluate Training Program

- Required to determine effectiveness
- Meeting training objectives per Facility Assessment
- Phases:
 - Individuals' response
 - Trainers' effectiveness
 - Training effectiveness
 - Changed behaviors and improved outcomes
 - Overall training program reviewed annually or as needed



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Training Program Evaluation Process



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Competency Based Training Program

- a. Evaluates current staff training program to ensure competencies
- b. Identifies gaps in education that may contribute to poor outcomes
- c. Outlines what education is needed based on resident population
- d. Delineates what specific training is needed based on facility assessment
- e. Details the tracking system used to ensure competency program is assessing, planning, implementing, and evaluating effectiveness of training
- f. Ensures the competency training is not limited to online computer based but also test for critical thinking skills as well as the ability to manage care in complex environments with multiple interruptions

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Key Strategies for Leaders



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Steps for Developing the Process (Using Clinical as an Example)

1. Prepare a "Needs Assessment" of our Clinical Team!

- a. Communication System for Changes of Condition
- b. Assessment Skills of the Nurses
- c. Knowledge of Disease States
- d. Pharmacology knowledge for nurses
- e. Comprehensive, person-centered care planning
- f. Communication
- g. Documentation
- h. Facility wide resource assessment
- i. Others based upon unique facility needs



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Steps for Developing the Process

2. Engage Key Players:

- a. Medical Director
- b. Practitioners
- c. Acute Care Partners
- d. Pharmacy Consultant
- e. Lab/Radiology
- f. Home Care, Assisted Living, Hospice entities



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Steps for Developing the Process

3. Develop Your System
 - a. Policies and Procedures
 - b. EHR/Forms Management
 - c. Assessment Process
 - d. Care Plan Process (Including Discharge Care Planning)
 - e. Communication Process
 - f. Staff Education
 - g. Practitioner Education
 - h. Resident/Family Education
 - i. Evaluation and Follow-up
 - j. Include regulatory (State and Federal) requirements
 - k. Include evidence-based materials



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Clinical Capacity and Capabilities

Assess Clinical Capacity

- Safely manage acute conditions
- Disease state programs
- Episodic Management
- Rapid turnaround for admissions
- All hours

Engage Medical Director and Physicians

- Specialists
- Extenders

Clinical Capabilities

- Assess current status
- Determine targeted population
- Develop capabilities list
- Utilize best practice standard tools for listing, communication strategy
- Medical Director, physicians, and extenders – input and agreement
- Internal and External Communication
- Monitor via QAPI

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Identify Documentation that SUBSTANTIATES Education and Competency

Name: _____ Title: _____ Hire Date: _____		Evaluation (Check Date)	Method of Evaluation (Check Date)					Verification (Check Date)
Skill Area	Competency Demonstrated (Check)	Needs Additional Training	S	S	M	Y		
Admission	History and Physical							
Equipment/Outfitting	Rooming Assessment							
	Admission							
	Room Change							
Catheters	Catheterization - Perineal							
	Catheterization - Male							
Change of Condition	Family/Functional/Behavioral							
	Visit Signs							

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Action Plan for REAL LIFE Audits!

AREA OF CONCERN	RECOMMENDATIONS	GOAL DATE	RESPONSIBLE PERSON
Lung Assessment not completed with resident s/s "productive cough"(Pneumonia dx)	1. Nurse re-educated in assessment process with return demonstration of lung assessment.	3/15/23	DON or Nurse Manager
	2. Nurse re-education in documentation requirements.	3/15/23	DON or Nurse Manager
	3. Follow up review of assessment and documentation each shift	Beginning 4/15/23	DON or Nurse Manager

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QAPI Action Plan

QAPI ACTION PLAN						
Location/ Facility Name	Unit or Population	Date	Team Members			
Brief Description of Problem						
Root Cause Analysis						
Area of Concern (e.g., compliance with Resident Care)	Responsible Person (Name)	Start Date	Completion Date (MM/DD/YYYY)	Current Completion % (MM/DD/YYYY)	Comments	

QAPI ACTION PLAN - FOR USE BY PROVIDERS ONLY

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Competency Based Training


Summary



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Summary

- Prepare Needs Assessment and Gap Analysis
 - Organization
 - Individual
- Resident population needs
 - Facility Assessment
 - Organization Data
 - Partners, others
- Determine KSAs based upon the above
- Determine/prioritize competencies
- Training - Meaningful and Fun!
- Engage external resources
- Training Program - Overall
- Evaluate and Incorporate




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**“Tell me and I forget,
Teach me and I may
remember,
Involve me and I will
learn”**


- Benjamin Franklin



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Thank You!



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Questions?



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References and Resources

- Centers for Medicare & Medicaid Services. State Operations Manual, Appendix PP, Guidance to Surveyors for Long Term Care Facilities (Rev. 208, 10-21-22): https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/downloads/som107ap_pp_guidelines_ltcf.pdf
- Centers for Medicare & Medicaid Services. MDS 3.0 RAI Manual. <https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInits/MDS30RAIManual.html>

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References and Resources

- Stalburg, C.M. Miller's Pyramid: Clinical Competence: https://open.umich.edu/sites/default/files/downloads/0202-f13-ms-coursera-imhpe-cstalburg-millers_pyramid_cleared.pdf
- American Heart Association. Heart Failure. <https://www.heart.org/en/health-topics/heart-failure>

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