



Catalog of Services

*Training,
Consulting
and Presentations*

H&W INDEPENDENT
SOLUTIONS
Consulting & Training • **Disability Supports and Services**

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Training programs and consulting services customized to meet *your* organization's needs.

Training and Workshops:

H&W principals are skilled trainers and workshop facilitators on a wide range of topics pertinent to organizations supporting people with disabilities. Select from the catalog of existing offerings and build a training program for your organization. From one hour to multiple day programs, H&W will work with your needs and budget to maximize the effectiveness of your training event.

Training Curriculum Design:

Every organization is unique. If you want something special for your group, let H&W design and deliver a custom curriculum to address your specific needs. H&W can assess your organization, design custom course curricula including learning objectives, detailed agendas, deliverables and training schedules, and assemble a qualified team of professionals to deliver the training.

Speaking Engagements:

H&W's principals are dynamic speakers and facilitators for your conference or organization's event. Let us build a program around your theme to energize your attendees with keynote addresses, break-out sessions and panel moderation to fit your audience and objectives.

Consulting Services:

Need a more focused, hands-on solution? H&W consulting services can help you resolve organization and program problems in a practical, effective manner. Improve your supports and services by looking at quality systems, risk management, policies and procedures as well as regulation compliance. Build a stronger organization by evaluating structure, communication and implementing a dynamic vision and strong strategic plan. H&W will help you find the answers you need.

Catherine V. Hayes, MA, President, has 30 years of experience with a primary focus in the field of intellectual/developmental disability issues. She brings a unique, 360° perspective to the field, having family members with disabilities and experience as a provider, trainer, surveyor and regulator. She has worked in a variety of settings including six years with the Federal government in Baltimore at the Centers for Medicare and Medicaid Services (CMS). Ms. Hayes held a variety of positions serving as manager, trainer, quality improvement coordinator and Director of Operations and surveyor/trainer with The Accreditation Council (now CQL). She has authored numerous articles as well as *Positive Outcomes: A Provider's Guide to Active Treatment*, published through the ANCOR network and also contributed a chapter in the book *Quality Enhancement in Developmental Disabilities*. Ms. Hayes is currently working with CMNS to provide training materials and present training for ICF/MR surveyors across the country.



Mark Wiesel, Vice-president, has over 25 years experience in management development, business management and project development in both commercial and not-for-profit arenas. He is a highly effective facilitator for improving organization structure and communications to enhance quality of care and daily operations. Mr. Wiesel's experience in developing and delivering training curricula includes front-line staff development, management and supervisory skills, non-profit board development, leadership training, system and self-advocacy and other topics for staff and volunteers. Speaking engagements include those for the California Caregiver Resource Centers, University of Southern California, University of California at Los Angeles, National Association of QDDPs, Private Providers' Association of Texas, Developmental Services Network and California Association of Adult Day Services.

Why you should contact H&W Independent Solutions:

Perspective: Multi-dimensional perspectives on service delivery from experience as caregiver, volunteer, provider, manager/administrator, quality enhancement coordinator, surveyor and regulator.

Dedication: Adding value to your organization by promoting quality and organizational improvement through training and facilitation.

Commitment to your success: Hands on practicality combined with the ability to analyze and design systems promoting innovation and organizational competence for sustainable change.

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Consulting Services

Accelerated Corrective Action Team (ACAT) - The ACAT model is designed to provide rapid change in response to Immediate Jeopardy findings, or where sustained, high intensity change management is necessary due to resistance to change and/or ineffective management. The specific implementation elements of the ACAT model make it creative and successful. The results can be remarkable and, if implemented correctly, this model is effective in producing sustainable change. The model works best if the key elements are put place early in the process. Intensity is key, and separates the ACAT concept from the traditional corrective approach of training staff and completing follow-up monitoring/feedback on a periodic basis. The concept uses a team approach with several team members onsite on a constant basis. This hands-on approach focuses on very quick improvement/change and is especially useful for new projects or situations where staff is resistive or supervisors are weak. By constantly being onsite, the team not only provides ongoing training but observes results and gives immediate feedback. Please request our separate document *Accelerated Corrective Action Team (ACAT) Model* for more details.

Mock Surveys/Training Surveys — We developed this process to provide ICF/MR organizations with a proactive approach in providing services for people with intellectual/developmental disabilities (I/DD) in ICFs/MR and to assist in preparations for certification visits. H&W offers a collaborative effort that results in a comprehensive mock survey to assist in meeting the Centers for Medicare and Medicaid Services (CMS) ICF/MR regulations. The H&W process is a flexible approach to reviewing the supports and services at the facility in accordance with ICF/MR regulations. It is *not* just another assessment of those services, but may be customized to meet the specific needs of the organization, including recommendations for corrections, action plan development and compliance training during the mock survey process. H&W will work with management prior to performance of the mock survey to address issues such as:

- Specific areas that have been cited in previous surveys
- Specific incidents that have been identified by the risk management process
- Problematic residential units or programs
- Other areas of concern identified by facility management

H&W offers five levels of mock surveys to meet your needs:

1. Independent Survey producing citations and recommended actions.
2. Interactive Survey incorporating facility staff as “shadows” with discussion of observations and findings. Produces a list of citations and recommended actions.
3. An Independent or Interactive Survey *plus* technical assistance to develop a full Action Plan to address each of the deficiencies.
4. Training Survey incorporating facility personnel into the survey process, train these personnel on the survey process and compare the survey results with a facility self-assessment tool.
5. The Training survey *plus* additional training on the development and implementation of Plans of Correction.

Please request our separate document *Mock Survey Process for Certification Maintenance and Survey Preparation* for more details.

Risk Management/Protection from Harm — H&W has a significant background in Risk Management and Abuse and Neglect Detection and Prevention issues. Catherine Hayes, H&W principal, organized the CMS Abuse and Neglect Prevention Forum, which resulted in numerous changes to regulations, policies and procedures. She oversaw the development of the "Abuse and Neglect - Seven Key Components to Prevention" training, used to train federal and state surveyors. In addition, she served as an advisor to U.S. Department of Health and Human Services (DHHS) Office of Inspector General as they researched and wrote Reporting Abuses of Persons with Disabilities and Safeguarding DC Residents who have MR/DD: Responding to Allegations of Abuse and Neglect. She worked closely with the Department of Justice, Civil Right of Institutionalized Persons Act (CRIPA), regarding regulations and requirements in ICFs/MR

and coordinated meetings with CMS, DOJ and OIG regarding abuse and neglect issues in Washington, D.C. that were reported on in the Washington Post in 1999. H&W makes available to all customers our *Abuse and Neglect Prevention Systems: Evaluation and Implementation Guide*. This document is a practical guide for evaluating compliance with industry guidelines for a high quality Abuse and Neglect Detection and Prevention System, incorporating the **7 Key Components** as developed by the Centers for Medicare and Medicaid for use across all support settings.

To assist in bringing ICFs/MR back into compliance with the Centers for Medicare and Medicaid (CMS) Condition of Participation of Client Protections and assure that there is a risk management system that identifies, tracks, and monitors incidents of harm, H&W will:

1. Review revised Policies and Procedures related to risk management, abuse and neglect, and incident management. Ensure that they are consistent across policy and procedures and they meet state and federal requirements.
2. Compare the current process in place for client protections against the revised policy and procedures (P/P).
3. Make recommendations to ensure compliance with ICF/MR Client Protection requirements.
4. Analyze the current system for conducting investigations for peer to peer abuse and injuries of unknown source. Identify barriers that prevent a timely and effective investigation. Recommend and conduct training for the staff responsible for the function.
5. Analyze the system for using data gathered related to risk management and client protections and conduct training on how to use the data to identify and correct issues.
6. Conduct training on investigations for all levels of the organization

Active Treatment Mentoring/On-Site Assistance Teams — Often in ICFs/MRs there is a lack of understanding regarding Active Treatment. Active Treatment is meant to be more than just the formal objectives outlined in the habilitation plan. Instead, each individual should be encouraged to participate fully in his/her daily routines. He/she should be offered multiple choices and options and encouraged to use existing skills. Staff should be helping or assisting individuals to do activities so that they learn, rather than doing things for the individuals. This service option is meant to go beyond the standard classroom training and follow up activities. H&W mentoring and onsite assistance includes:

- a. H&W provides onsite mentors to work on-the-job with Direct Support Professionals, QDDPs, Day Program Staff and other members of the ICF/MR's support team to demonstrate and incorporate appropriate Active Treatment methodologies into their daily interactions with the individuals.
- b. H&W reviews activities on campus, availability of materials, and a range of options to engage the individuals. This information supports the formation of a facilitated workgroup to improve these services. As refresher opportunities, H&W can provide training to staff and individuals to encourage their engagement in a meaningful way in the daily activities and the meal time process.

Review of Day and Vocational Programs (On and Off Site) - Most facilities have a combination of on-campus and off-campus day settings that are used throughout the day. Nationally, day program services are problematic. The ICF/MR regulation W120 which addresses outside services is one of the most frequently cited deficiencies. Although some day programs are organized and offer a variety of training opportunities, some of which are paid; many are not constructive, stimulating settings for most of the individuals who attend. Problems include functionality of activities, communication between the day site and the facility and the need for specialized programming for seniors. H&W can offer activities to address these concerns, including:

- a. Conducting an assessment of a sample of day programs.
- b. Set up a committee, including The ICF/MR and Community residential and day site providers, to review the current day program services offered across the state.
- c. Ask all committee members to provide input regarding use, satisfaction and suggestions for strengthening the offsite day sites.

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d. Develop a detailed plan to improve services for the day sites, including a list of expectations, a monitoring system and a process for day providers to request technical assistance help. Develop a consistent, data driven evaluation and review process, including developing a consistent tool for consumers and Quality Management personnel to complete that gathers consistent information and provides for a rating scale to measure success.

Performance Feedback Systems/Training — Often, large ICF/MR facilities have no effective, ongoing systems to observe and provide performance feedback to direct support staff regarding the consistent implementation of behavior plans, skill acquisition plans, keeping individuals engaged during recreation/leisure periods, and data collection. To address this need the following is recommended:

a. Develop formal systems to observe and provide performance feedback for the implementation of behavior plans, skill acquisition training, and keeping people engaged during recreation/leisure periods.
b. Develop procedures that specify who will conduct performance observations in the various active treatment modalities and how often individual staff members will receive performance feedback.
c. Develop a data-based system to monitor performance observations and feedback at the facility level; on a system-wide basis.

d. At the facility level, regularly scheduled “quality meetings” should include a review of the data from observation and feedback forms, take action to address identified problems, and track progress in resolving performance or programmatic issues.

e. For behavior plans, include “behavior drills,” possibly in some revised or adapted format.

At the Division/system level, the data and documentation should be monitored to ensure that all facilities are effectively implementing the performance observation and feedback procedures.

QDDP Mentoring/Training — QDDPs sometimes lack access to the ICF/MR regulations and other reference materials that would assist them to understand their role and function. Training and orientation for the QDDP job may be lacking. There is also a need to plan for transition or retirement of QDDPs who have been in the system for many years. The role of the QDDP is critical in the ICF/MR program. Like other disciplines, there is a need for someone to lead and coordinate QDDP services in order to ensure continuity and effectiveness. This includes orientation and ongoing training, as well as quality management.

Across the country, ICFs/MR are recognizing the need for a QDDP Coordinator. The QDDP Coordinator provides overall coordination and technical support for the QDDPs in their center. Ideally, this is a full time role. They should facilitate regularly scheduled QDDP meetings including developing agenda items and distribution of minutes; provide consultation/technical assistance to QDDPs as needed/requested, and conduct training for QDDPs on selected topics.

H&W can assess the current training and mentoring process at the facility and make recommendations for actions. They also offer training and support for new QDDPs and for transition planning.

Standardization of QDDP Reviews — One of the most crucial components of the QDDP function is to review the individual’s IPP and programs on a regular basis and make the necessary revisions to ensure the continued success of the individual. The QDDP review process is a multifaceted process to determine if supports and services as outlined by the person’s annual habilitation plan are effective in addressing identified needs as well as meeting emerging needs. In order to complete a thorough review, the QDDP is required to review documentation and complete an analysis of available information. The QDDP will ensure additions and/or revisions to the plan are made as needed, in a timely manner, based upon the analysis. These changes are made in conjunction with the IDT.

Often, large systems allow for variation in how this process is completed as the ICF/MR regulations do not specify what a QDDP review should look like. Problems occur when this function is not performed consistently. H&W can review the ICF/MR's system and make recommendations regarding format, re-training, updates and other necessary actions needed to ensure that the QDDP reviews serve as the frontline of defense against problems in active treatment and providing supports and services as required by the ICF/MR regulations.

HRC Reviews/Training — There is often great variation in the understanding of the role and the function of the committee.

Many of the top 10 ICF/MR deficiencies result from ineffective Human Rights Committees (HRCs). Few committees complete an overview of incidents, injuries, abuse and/or neglect allegations and investigations to identify possible patterns or trends as well as other areas of rights such as guardianship/advocacy issues, advance directives, etc.; all areas of review encouraged by the ICF/MR regulations. Both CMS surveyors and DOJ reviewers will use the HRC minutes in their review process. It is critical that the minutes capture the correct balance of information so that the facility and reviewers can track actions and discussions, but not waste staff time and energy on overly detailed minutes. H&W can assess the need and offer services including:

- a. Assisting the organization to review or develop a resource guide for HRCs to improve the minutes, orientation and other functions of the committee.
- b. Coordinating input to the organization on the content and need for revisions to HRC training.
- c. Developing an orientation or mentoring process for new HRC chairs.

Review of Consents and Guardianship Issues — Guardianship is a significant human rights issue and use and maintenance of proper consents is an ongoing challenge. Failure to adequately address guardianship and consents often contributes to multiple deficiencies in ICFs/MR. Providers are often asked to demonstrate evidence of “informed consent” for health care decisions and restrictive or intrusive procedures. In some states, surveyors have issued citations to providers for the lack of informed consents and providers have struggled with how to obtain a meaningful consent, short of obtaining full guardianship for the individuals served.

H&W worked with Quality Trust, where representatives of the District of Columbus government, provider and advocacy groups came together to form a workgroup to discuss guardianship and informed consent concerns for people being supported by the service system in Washington D.C. Goals of the workgroup include identifying and promoting alternatives to full guardianship that will decrease the number of individuals at risk of losing their rights through a full guardianship and developing training and resource materials. This included a series of research calls to various organizations and individuals around the country who have addressed informed consent and alternatives to guardianship to see what lessons we could be learned from their efforts. The research resulted in the identification of an array of approaches which H&W can share with the organization.

Planning for Special Populations (Aging Adults, Dual Diagnosis, and Autism) - Individuals who do not meet the more traditional characteristics of people served in ICFs/MR are now entering the system. Many states are facing a huge demand for services and must act quickly to address both the current and future needs of its residents with developmental disabilities including:

- Individuals who are aging out of the school service system and for whom community placements have not been successful.
- Individuals who have dangerous behavior or have had encounters with the criminal system.
- Individuals with dual diagnosis or borderline personality issues.
- Individuals with a history of sexual predator behaviors.
- Individuals with autism.

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- Seniors or individuals who are aging.
- Individuals with high medical needs.

H&W can provide support to develop a plan by:

- a. Bringing together key players (stakeholders) including providers (community and ICF/MR), families, advocates, legislative representatives and others from across the state to address the needs of these specialized populations.
- b. Developing a consistent approach for providing supports and services for these populations.
- c. Identifying where the facility is already skilled in meeting the needs of certain populations and build on these programs.
- d. Helping to develop a blueprint for the future service delivery system.

Review and Enhance the New Employee Orientation — New employee orientation training programs are critical to the success of daily services and supports. These should be reviewed and enhanced on a regular basis. The quality and work ethic of new employees, particularly at the frontline category, must be reinforced from the first day of employment. Retention of new employees is also difficult, primarily due to a lack of understanding of the requirements and demands of the job. To address these needs H&W can provide support to:

- a. Review current training curriculum and interview staff throughout the system to assess for strengths and weaknesses.
- b. As needed, revise the direct support staff program to be more “values” based.
- c. Integrate ways to introduce the trainees to people with developmental disabilities/residents in the classroom situation prior to sending the trainees out to the living areas. Have the residents explain their expectations of the DSPs.
- d. Update the entire training package to more current information and formats.
- e. Develop a specific curriculum for RNs and LPNs. Nursing orientation is most often very limited and done mostly “on-the-job”.

Plans of Correction (2567) – Review and Preparation — H&W can assist in your preparation and response to the CMS statement of deficiency report (2567) resulting from your state survey. H&W will discuss methods for resolving citations and developing appropriate remedies for your organization to assist you with your plans of correction. We can also review your draft to make sure it covers all the elements required by CMS.

Analysis of survey reports and trend analyses reports can be invaluable in identifying trends and potential problem areas for your company. Often, what surveyors find in one home will soon appear on the survey report for another home in an organization. By taking the time to analyze the data and summary reports related to State survey reports, the agency can anticipate systemic issues and use the information to proactively plan for change. H&W provides this service and will deliver a grid analysis and written report with recommendations for short and long term changes to strengthen the organization.

Quality Assurance/Quality Enhancement Review — The concept of quality assurance has broadened in the last few years to include a focus on the desires of individuals served. Individuals, families and the providers must be an integral part of planning and carrying out a quality assurance system. A good quality assurance system does more than assure that regulations are met and that consumers are “satisfied” with the system. H&W will review your system to assess whether it is a functional and useful system that addresses licensing and certification requirements and to determine whether it goes beyond the basics to measure family and consumer concerns. A strong quality enhancement system should include a con-

tinuous loop of information that will guide the organization to make ongoing improvements that assure consumer health and safety, while it also works to support each individual achieve their full potential. H&W will assist you to assure that your system does just that.

Policy and Procedure Review and Revisions — It is critical organizations take time to review their risk management, abuse and neglect policy and procedures (P/P), training materials and other relevant materials to assure that these materials are reflective of current regulations. Organizations must have current policies and procedures that serve as a clear guide for consumers, staff and family members in how to identify and prevent harm. H&W can assist the organization to conduct this review and will make recommendations for changes that reflect current regulatory requirements, as well as suggest ways to incorporate the seven key components for abuse and neglect prevention.

Organization Analysis — Does the structure of your organization help or hinder the effective delivery of supports and services? Have informal groupings grown up that conflict with your formal organization? H&W can evaluate the formal structure, chain of command and informal operating structures existing in your organization to help you find more efficient and effective ways to perform your mission and reach your goals. Customized deliverables may include recommendations for structure change, implementation planning and assistance with transition.

Organization Communication Evaluation — H&W can help you improve internal and external communications. Breakdowns in communication channels are often responsible for breakdowns in the quality of supports and services you provide. Through a series of on-site observations and interviews, H&W will provide a picture of how communications actually flow within your organization, identify the sources and probability for communication failures, both unintentional and intentional. Recommendations for corrective actions will be made. Implementation planning and assistance are available as requested.

Strategic Plan Facilitation — An on-going review, re-evaluation and refining of your organizations strategic plan is a must. H&W will help you assure that your vision and mission are being supported and that your strategic planning is viable. We can facilitate planning meetings and retreats for senior staff and/or board members to produce an effective plan for your organization. Beyond that, H&W can help you implement a goal development and alignment procedure appropriate to your organization so that all staff levels are focused on the proper objectives.

Board Development — H&W is skilled in providing support services for boards of directors in the disability community. We can facilitate board retreats/workshops focused on planning, fundraising, staff relations, succession planning or basic board functions and organization. If your board needs refocusing and re-energizing, H&W can work with you to plan and implement an event to meet your requirements.

Project Management

Agencies are often faced with limited resources when the need to tackle important transformation or quality improvement projects arises. Burdening management and supervision with the task of finding, contracting with and managing a group of professionals to assist in these projects is onerous, not to mention the challenge of keeping everyone on task and performing to schedule. H&W can provide the project management and assemble a qualified team of nationally recognized consultants to address directly your requirements.

Our team consists of the H&W principals and over 20 other subject matter experts, each with over 20 years of experience in serving the field of intellectual/developmental disabilities. We offer a wide range of expertise including: survey and certification compliance; active treatment; vocational, habilitation and clinical program management; abuse and neglect prevention and detection; medical and nursing; psychiatry; psychology and behavioral health; Investigations; training and staff development; task oriented project management; strategic planning and policy development, and support for DOJ compliance projects and investigations.

One advantage of working with H&W is that the customer works directly with the principals and owners of the business, who personally manage the projects and perform an integral role in the evaluations, report preparation and plan development. Therefore, the success of the projects is of prime importance to the company and the principals.

Some of the types projects managed by H&W include:

- System or Facility-based Service Delivery System Evaluations
- Performance Assessment Projects
- Corrective Action or Improvement Plan Development and Implementation
- Strategic Planning and Transformation Initiatives
- Mock Surveys and Regulatory Compliance
- Litigation Support/DOJ Investigations

Let H&W assemble a team of qualified consultants matched to your organization's needs. Our consultants have expertise in:

- Habilitation
- Interdisciplinary Team and Individual Program Planning
- State and Federal Surveys
- Behavioral Health
- Psychiatric Services
- Medical and Nursing Services
- Physical and Nutritional Management
- Business Processes
- Staffing
- Training
- Human Resources
- Organizational and Cultural Change

Keep your organization focused on its mission—supporting individuals with developmental disabilities while H&W manages the special projects necessary to move the organization forward.



Regulatory Compliance

Presentation Title: Preparing for Survey – How to Think Like a Surveyor		Instructor(s): C. Hayes
Description: This program teaches the participant to “think like a surveyor”. It covers the eight survey process tasks through the eyes of the surveyor. Participants learn how to read the regulations and their guidelines, what a compliance principle is and what role facility practice statements play. The three tools that every surveyor uses will be highlighted and participants will have the opportunity to ask “what were they thinking when...”		
Presentation Length: 4 to 8 hours	Minimum/Maximum Attendees: 20 – 100	

Presentation Title: Understanding the Conditions of Participation – “The Regs”		Instructor(s): C. Hayes
Description: The ICF/MR regulations are made up of eight separate conditions of participation (CoP) which providers must comply with at all times. Each CoP will be briefly reviewed. The four fundamental CoPs, client protections, active treatment services, client behavior & facility practices, and health care services (along with their 55 fundamental requirements) will be reviewed in more detail.		
Presentation Length: 4 to 8 hours	Minimum/Maximum Attendees: 20 – 100	

Presentation Title: Behavior Management: Understanding the ICF/MR Requirements		Instructor(s): C. Hayes
Description: The focus of this presentation is improving providers’ understanding of the CMS expectations when using any restrictive technique to manage an individual’s behavior. The topics are: 1) Who – Which Individuals or procedures fall into this category; 2) When – What you must do when you use restrictive procedures; 3) What – Can you do and not do; 4) How – To set up a process that meets regulatory requirements.		
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 20 – 60	

Presentation Title: Plans of Correction	Instructor(s): C. Hayes
Description: Do you find the CMS statement of deficiency report (aka 2567s) is sometimes a mystery? Have you taken time to learn how to obtain copies of completed reports or how to use the reports to identify trends and potential problem areas? This training will assist you to understand how to obtain copies of survey reports, how to read and interpret them and how to use the information to plan for change.	
Presentation Length: 4 hours	Minimum/Maximum Attendees: 20 – 40

Habilitation Planning

Presentation Title: Active Treatment – Are you Meeting the Consumer’s Needs?		Instructor(s): C. Hayes
Description: Consumers admitted by an ICF/MR must be <i>in need of</i> and receiving active treatment (AT). ICF/MR surveyors have issued W198 citations when they find someone who doesn’t need AT. This program examines how to assess and determine if a consumer is in need of the intensive supports provided by ICF/MRs, thereby avoiding citations and time-consuming corrective planning following surveys.		
Presentation Length: 1 to 4 hours	Minimum/Maximum Attendees: 20 – 100	

Presentation Title: What Every QDDP Needs to Know		Instructor(s): C. Hayes
Description: This presentation will increase QDDP knowledge regarding their role in habilitation planning. QDDPs will learn: To read and understand the ICF/MR regulations and the eight (8) Conditions of Participation that make up the ICF/MR federal requirements; To identify and apply the components of the “active treatment loop”. Attendees will gain an increased understanding of the role of the QDDP.		
Presentation Length: 2 days	Minimum/Maximum Attendees: 10 – 40	

Presentation Title: Active Treatment Symposium		Instructor(s): C. Hayes
Description: This program covers the evolution of AT to the current focus on supports and services. The components of the active treatment loop, including assessment, team planning, development of a program plan and monitoring are reviewed. The course also identifies challenges in adapting services to meet the changing needs of individuals. The training will be tailored to meet the specific needs of your organization.		
Presentation Length: 4 hours to 1 day	Minimum/Maximum Attendees: 20 – 60	

Presentation Title: Making Person-Centered Planning Work in the ICF/MR Program		Instructor(s): C. Hayes
Description: The ICF/MR regulations define and require Active Treatment for individuals served. Many of the principles of Person-Centered Planning are shared by the principles of Active Treatment as defined by the regulations. The information provided should help participants assure their ICF/MR services are person-centered.		
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 20 – 60	

Presentation Title: Aging and People with Developmental Disabilities		Instructor(s): C. Hayes
Description: As a group, people with intellectual/developmental disabilities may have a shorter life span, frequently are physiologically older than their chronological age, and experience dementia at a higher rate than the general population. This session reviews the signs and symptoms of aging and dementia and assists the provider to effectively provide individuals with services that meet regulatory requirements.		
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 20 – 60	

Risk Management

Presentation Title: Abuse and Neglect Detection and Prevention		Instructor(s): C. Hayes
Description: This program examines the abuse and neglect detection and prevention surveyor training program developed by CMS. The attendees will gain an understanding of the Seven Key Components that are part of the CMS program and how to apply them at their agency. The training will provide information that can be taken back to the workplace and immediately implemented.		
Presentation Length: 4 to 8 hours	Minimum/Maximum Attendees: 20 – 100	

Presentation Title: Appendix Q – Determining Immediate Jeopardy		Instructor(s): C. Hayes
Description: Appendix Q of the CMS State Operations Manual was revised in August 2000. It standardizes definitions for immediate jeopardy, abuse and neglect and establishes an identification process. This training reviews Appendix Q's principles, immediate jeopardy triggers, procedures, documentation, enforcement and references and will assist the provider to organize an effective risk management system.		
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 20 – 60	

Presentation Title: Investigations – An Overview		Instructor(s): C. Hayes
Description: This training is an overview on organizing and conducting onsite investigations for all types of settings. Attendees will learn what to consider before starting, who should do the investigation and how to organize for the investigation, interviews, record reviews and observations. You will learn to decide if your findings are significant and how to organize and document your findings into an effective report.		
Presentation Length: 4 to 8 hours	Minimum/Maximum Attendees: 20 – 100	

Presentation Title: Abuse and Neglect Policies and Procedures	Instructor(s): C. Hayes
Description: The abuse and neglect policies and procedures, training and relevant materials of every agency require review on a regular basis. The goal of this program is to assist agencies to develop a P&P that is consistent with State and Federal regulations, incorporates the Seven Key Components for abuse and neglect detection and prevention and serves as a clear guide for staff and family members.	
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 20 – 40

QDDP/QMRP Development

Presentation Title: QDDP/QMRP Basic Training		Instructor(s): C. Hayes
Description: This presentation is a comprehensive 2 day training session for beginning QDDP/QMRPs. The new “Q” will receive a comprehensive overview of the job roles, duties and function. It introduces the beginning Q to the regulations, assessments, active treatment, the IDT process, program planning and periodic review process. Also recommended for managers and supervisors who oversee the Q positions.		
Presentation Length: 2 Days	Minimum/Maximum Attendees: 12 – 20	

Presentation Title: Putting the QDDP in Quality		Instructor(s): C. Hayes
Description: This session focuses on preparing for a successful IPP annual meeting, managing the meeting, coordinating services with day programs and providing Quality Enhancement activities that assist the agency to best meet the needs of the individuals served. The workshop provides sample formats to assist the QDDP to “feel good about quality” . Some of the topics covered will include: QDDP reviews – Function and Outcomes, Monitoring for Quality, Running a successful team meeting, and Planning and coordinating with offsite or day programs.		
Presentation Length: 4 – 8 hours	Minimum/Maximum Attendees: 12 – 24	

Presentation Title: The IDT Process—Efficiency and Effectiveness		Instructor(s): C. Hayes/M. Wiesel
Description: Running successful meetings, managing the team process and working with a busy professional staff re significant challenges to facilitating a good IDT meeting. This presentation focuses on communications, personality management and process facilitation that encourages full and meaningful participation from the IDT members and provide the Q with a set of tools to maximize his/her capabilities in this area.		
Presentation Length: 4 hours	Minimum/Maximum Attendees: 12 – 24	

Quality Enhancement

Presentation Title: Quality Enhancement: Creating Services that Make a Difference		Instructor(s): C. Hayes
Description: This presentation will review the various components of a quality enhancement program, discuss how quality assurance is different than quality enhancement, and review the benefits to a well-designed quality enhancement system. Some simple tools will be shared with you. This presentation is applicable to any provider in any service setting that wants to do more than “just the basics”.		
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 20 – 100	

Presentation Title: Designing an Internal Continuous Quality Improvement System		Instructor(s): C. Hayes
Description: Many agencies react to survey and certification reviews rather than preparing for them. The best system of assuring quality is an internal, uniquely designed system that is tailored to the needs of each agency. This training session will assist agencies to review their current quality assurance system and map out a plan to implement a new and proactive system of assuring health and safety of all individuals served.		
Presentation Length: 4 hours	Minimum/Maximum Attendees: 20 – 60	

Presentation Title: Doing the Right Thing for the Right Reasons		Instructor(s): C. Hayes/M. Wieselk
Description: Values driven quality is the toughest to achieve, but the easiest to maintain. This session focuses on why we should do what we do, the values behind the regulations and what every staff member needs to understand to ensure the delivery of quality supports and services. It reinforces the right reasons for person-centered supports across all programs and job functions.		
Presentation Length: 4 hours	Minimum/Maximum Attendees: 15–40	

Management and Supervision

Presentation Title: Managing Yourself to Manage Others		Instructor(s): M. Wiesel
Description: Most managers try to make employees conform to the manager's definition of acceptable behavior and style. However, the most successful managers are those that learn to adapt themselves to the style that best fits individual employees. This session concentrates on management qualities and style, "flexible" management, responsibility and accountability, communications and managing yourself.		
Presentation Length: 2 to 4 hours	Minimum/Maximum Attendees: 10 – 50	

Presentation Title: Have Fun and Still Get the Job Done		Instructor(s): M. Wiesel
Description: Too often, we get caught up in the serious nature of our work and forget what makes it enjoyable. This fun but practical workshop reminds us work is what you do for a living but it's not how you live. We need to not to take ourselves too seriously. We will spend time learning how to find the fun in what you do. When it comes to job satisfaction, it's often HOW you do things, not always what you do.		
Presentation Length: 3 to 5 hours	Minimum/Maximum Attendees: 15 – 40	

Presentation Title: Key Performance Indicators (KPI) – Managing What Matters		Instructor(s): M. Wiesel
Description: This workshop focuses on ways to identify KPIs that define success for your organization. Every organization has a different personality, service approach and evaluates success differently. This interactive workshop will help you determine what matters most and provide the biggest payback in financial and quality improvements. We will also work on managing employees and behaviors that effect your KPIs.		
Presentation Length: 2 hours	Minimum/Maximum Attendees: 12 – 40	

Presentation Title: Running Successful Meetings	Instructor(s): M. Wiesel
Description: Too many, too long and too ineffective meetings reduce staff effectiveness and create conflict and morale issues. This session concentrates on keys to effective meeting management and group communications. Topics include agenda development, staying on purpose, action assignments and management and minimizing wasteful or unproductive time.	
Presentation Length: 2 - 4 hours	Minimum/Maximum Attendees: 12 – 24

Staff Development

Presentation Title: Assertiveness and Self-Confidence on the Job		Instructor(s): M. Wiesel
Description: This workshop concentrates on communication fundamentals and managing aggressive behaviors in your direct reports and peers. Topics include: Managing Non-Verbal Communication; Behavior Styles; Assertiveness Techniques; and Building Confidence Through Preparation and Anticipation. Participants will gain methods to manage outcomes and obtain their goals in a positive manner.		
Presentation Length: 4 to 6 hours	Minimum/Maximum Attendees: 15 – 50	

Presentation Title: Time and Resource Management		Instructor(s): M. Wiesel and/or C. Hayes
Description: We are all expected to balance many activities and to achieve specific goals, so it is critical that we develop effective time management skills. The primary skill areas addressed in this training session are: Creating and Prioritizing Achievable Goals; Making Realistic Achievable Schedules; Acting to Make Goals a Reality; and Understanding How to Manage and Organize Resources.		
Presentation Length: 2 to 6 hours	Minimum/Maximum Attendees: 15 – 50	

Presentation Title: Best Practices and Lessons Learned for Your Organization		Instructor(s): M. Wiesel and/or C. Hayes
Description: The primary purpose of this session is to facilitate discussions around key job components. The class will encourage the sharing of examples and include structured group discussions around those examples. The format is structured as a brainstorming session that will encourage participants to share ideas, success strategies and build bridges throughout your organization.		
Presentation Length: 6 to 8 hours	Minimum/Maximum Attendees: 10 – 30	

Presentation Title: Advocacy and Community Organizing Skills	Instructor(s): M. Wiesel and/or C. Hayes
Description: This course is designed to enhance both advocacy and community organizing skills. An overview of community organizing objectives and pertinent processes will be presented to provide a basis for further investigation into approaches and a means to establish priorities and goals. Participants will leave with an understanding of the different types of advocacy and an overview of community organizing skills.	
Presentation Length: 2 to 8 hours	Minimum/Maximum Attendees: 15 – 40



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