CIS TRAINING PROGRAM
INITIAL TRAINING OVERVIEW

BACKGROUND

The Cancer Information Service (CIS) Initial Training Program is designed to assist the regional CIS Training Coordinator with the training of new CIS program staff. The Training Program consists of modules that cover a variety of topics. Since the modules were developed over the course of several years, various formats are utilized. Some modules are Web-based, multimedia programs, some are self-paced learning modules, and some are didactic instructional modules. Most have an accompanying *Information for the Training Coordinator*, which describes the module's learning activities, includes points to highlight, and provides answers to learning activities.

GOALS AND OBJECTIVES

The goal of the CIS Initial Training Program is to enable new CIS program staff to become familiar with basic cancer concepts and to learn how to access cancer information using National Cancer Institute (NCI) resources and approved non-NCI resources. The modules, together with the *Orientation for New Managers*, the *Orientation for New Training Coordinators, Initial Training Goals and Objectives for Partnership Program Staff,* and *Initial Training Goals and Objectives for Research Coordinator,* form the basis of initial training for program staff. The trainee's attainment of knowledge and skills for the trainee is documented on an ongoing basis by the Training Coordinator using a series of Tracking Tools. Additionally, the trainee must successfully complete the CIS Initial Training Final Exam.

After participating in various content and skills development activities provided by the program's training modules, trainees should be able to demonstrate the following abilities, which comprise the objectives of the program:

- Understand the mission, vision and objectives of the CIS program
- Provide tailored cancer information to meet the needs and expectations of the public and partners
- Provide referrals as appropriate
- Apply CIS policies and guidelines when interacting with the public and partners
- Interact objectively, credibly, and sensitively with the public and partners
- Collect reliable, valid program data

DESIGN CONSIDERATIONS

The training modules and accompanying materials that comprise the CIS Initial Training Program have been designed with several considerations in mind. The amount of didactic content varies according to the nature of the module's subject matter. In most cases, the key points provided in the modules are only general concepts rather than detailed information that would need to be updated frequently and consequently require continual modification of training materials. Trainees are referred to NCI fact sheets and other NCI-approved materials listed in the required or supplemental reading section for more detailed content. Modules that focus on information that will not be quickly outdated, such as the modules on communication and the psychosocial aspects of cancer, provide greater amounts of detailed content under the key points and thus require less content enhancement.

The modules are designed to focus on process as well as didactic content. They include interactive, adult-learning training methods that are intended to elucidate processes, stimulate explorations of concepts and issues, and develop a variety of skills. For example, the communication module emphasizes the process of structuring telephone calls in a logical way that allows the Information Specialist to tailor a response to the caller's needs and to clarify the caller's understanding of the information being conveyed.

The modules were developed in a flexible manner so they can be adapted to allow for differences among CIS regional offices, trainee needs, and training style and preferences. For example, in many CIS regions, training will be delivered to one new trainee at a time. In these instances, you can use these materials to help structure a "learning partnership" with the trainee, encouraging self-directed study, special research and information retrieval tasks, interviewing of more experienced information specialists, and development of ongoing personal learning objectives. If you train several information specialists together, remember that learners can benefit from group dynamics. Whether you use these materials to train individuals or groups, the training process can be instrumental in developing a strong team, which encourages successful learning and job performance for all CIS staff members.

The training modules allow for the fact that the background of the trainees within specific CIS regional offices may vary dramatically with respect to characteristics such as knowledge of cancer concepts and issues, personal experiences with cancer or with friends or relations who have cancer, knowledge of the local community and CIS region, communication skills, work habits, and previous training in cancer and/or information services. This variation demands flexibility in course delivery. The training modules are designed to allow you to spend more time on some topics or skills than on others. Consequently, you will need to assess the learning needs of trainees before teaching each module and tailor your delivery to these needs. Allowing trainees to discuss key questions and concerns about the module prior to beginning the training session can supply you with information needed for this adaptation. You are encouraged to add your own materials, including additional readings and exercises, based on the results of this assessment.

Manual Organization

The manual is organized to help you prepare and deliver modules in the training program. Each module contains the following components:

- **an overview of the module**, including the module purpose and objectives, required readings and materials, and the estimated completion time
- **an overview of each section**, which presents section objectives, required and supplemental readings for the section
- **content** for each section, which includes the section purpose; key points, relevant policies, and learning activities for each topic area
- **copies** of handouts, printed exercises, and review questions provided for trainees

- **additional** reading and/or **supplementary materials** at the end of selected modules to augment delivery

The module and section overviews and content outlines provided in the manual are presented in a standardized format for ease of identification and use. The following icons are used to allow the quick reference of each component of the overviews and outline:

@	Estimated Time of Delivery	Q	Training Aids
‘	Required Readings	H	Equipment and Supplies
#	Section Objectives	⏩	Learning Activity
L	Suggested Methods	r	Key Points
J	Trainee Materials	¶	Summary

The module and section overviews and the content outlines are intended to be used as general guides and not as “scripts”. You should use your own style of training and group process skills to individualize the program to the particular training setting.

Materials <u>Not</u> Included

Training materials that are critical to the training program but are **not** contained in this manual include:

- NCI publications and other required reading materials
- Copies of CIS policies
- Copies of CIS Position Descriptions and Performance Standards
- Copies of CIS forms (e.g. Contact Record Form, Clinical Trials Search Form)
- Tapes of CIS demonstration calls

In addition, you may wish to use alternative audio and visual materials to reduce trainee stress, enhance comfort, and reduce external distractions in the learning environment. For example, you may wish to bring music tapes to play at the beginning and end of each day and during breaks and lunch or bring quotes or cartoons for comment and discussion on cancer-related topics. You should be sensitive to the trainee’s culture and background when selecting these materials.

PREPARING TO CONDUCT TRAINING

The manual is intended to assist the Training Coordinator in providing experiences that are stimulating for the adult learner. It outlines a variety of approaches to providing trainees with opportunities to use didactic information in a dynamic way. Suggested activities are skillscentered and designed to be immediately applicable to the experiences of trainees, two qualities that studies have shown enhance adult learning.

You can ensure the smooth and effective delivery of the CIS Initial Training Program by preparing for all sessions using this manual and the other training resources at your disposal. Together, these resources form an integrated training package that captures both the process and the content of the training program.

There are many ways to plan how to deliver the information contained in the CIS Initial Training Program. The following are suggestions that may facilitate this planning. Careful preparation will increase your comfort with the content and process of the training program and improve the likelihood of a successful training outcome. Remember, the goal of this training is to assist new staff to develop the **basic** knowledge, understanding, and skills needed to function in their role in the CIS.

, Review the module from a trainee's perspective. This will help you to consider the module from the learner's perspective and highlight the key concepts on which you will need to focus.

, Review the module, the accompanying information for the Training Coordinator, and any associated materials (e.g. handouts, exercises). This will help you develop or select special assignments and tasks to help trainees become familiar with information resources and job responsibilities.

, Select training methods. While lecture or independent study may be necessary for the efficient delivery of content in many of the modules, remember to provide opportunities for questions and discussion. Use interactive, hands-on learning activities whenever possible.

, Review all readings and identify any additional NCI publications and relevant fact sheets. Select and assign readings and other self-directed learning activities for trainees to complete prior to beginning the module.

, Practice new or difficult technical terminology to ensure that trainees hear the proper pronunciation of key vocabulary.

, Invite guest speakers, including other CIS staff members, if appropriate. Confirm these speaking engagements in writing well in advance of the training date.

, Throughout the course, remember to construct clear transition statements between module sections to link exercises and lectures to the overall themes of the training. A "review and preview" should wrap up the entire section or module presented, and highlights the direction of the rest of the course, including themes and further skills to be developed.

, Many modules also are effective as self-directed learning tools. Help staff members being trained to understand how to effectively use the module. Review the standard elements of the module including resource materials, Internet links, and suggested learning activities. Help staff members set timelines for completion of self-directed learning tasks. Encourage staff members to engage in dialog, online searches, and self-testing to reinforce learning.

LOGISTICAL CONSIDERATIONS

In addition to training materials, you will need to address logistical considerations such as estimated delivery times, appropriate facilities, and equipment needs. These considerations are addressed below.

Estimated Delivery Times

The estimated times needed to complete a module are listed in the overview of each module. These times are approximations and are intended only as a guide. In general, they represent a minimum/the least amount of time you will need to present a module or that a trainee will need to complete a module. The estimated times **do not** include the time needed for trainees to complete the required readings. It is assumed the trainees will be provided with appropriate time to complete the readings before beginning each module. At your discretion, you can increase the time allotted to each module to allow for more discussion, additional exercises, or practicing specific skills.

Facilities

Training space available at your CIS regional office may be very different from that available at other regional offices. Be aware that at minimum, trainees will need a quiet space to read and study comfortably, access to in-house literature and other approved learning resources, including computer access to online resources and applications, space to meet with you for uninterrupted discussion and role playing, and room and equipment to participate in monitored telephone calls.

Equipment

Equipment needs include:

- a blackboard, chalk, and eraser or an easel with flipcharts, various colored markers, and tape
- an overhead projector, a slide projector, a screen, laptop, LCD, and an extra bulb for each of the projectors
- an audio cassette recorder/player for taped demonstration calls and for music if desired
- a speaker phone or other call-monitoring equipment to facilitate observation of and by the trainee

TRAINING EXAMINATION

All CIS program staff must successfully complete specified modules in the CIS Training Program and pass the written Initial Training Examination by the end of the first 3 months of employment. Information Specialists must successfully complete the standardized call scenarios in addition to the written examination. This assures that all CIS staff achieves a standard level of knowledge and skills. Research Coordinators, must successfully meet goals and objectives outlined in the *Initial Training Goals and Objectives for Research Coordinators*. Support staff is excluded from these requirements assuming their job involves only support duties.

The following instructions provide the Training Coordinator with information about how to administer and evaluate the final examination and standardized Test Calls.

Written Examination

The written Initial Training Examination is composed of 100 questions. Part I consists of 75 questions designed to measure all trainee's knowledge of basic cancer concepts, NCI-approved resources, and the CIS program, including policies and procedures. Part II consists of 25 questions based on job duties that will be performed by the trainee (Information Service or Partnership Program).

Each trainee must complete the written **Initial Training Examination** Part I and Part II. Part II of the written exam should be given based on the job duties (Information Service or Partnership Program) that will be performed by the trainee. It may be appropriate for a trainee to take both Part II examinations if they will be performing combined job duties.

Although it is not designed to be a time-limited test, the written examination should take approximately 60 to 90 minutes to complete. This examination is intended to be a closed book test, with the exception of the use of an Electronic Contact Record Form (ECRF).

The standardized calls for Information Service staff are designed to evaluate each trainee's ability to use the equipment and resources, and to meet callers' needs and expectations under conditions that simulate an actual call to 1-800-4-CANCER. Specifically, the trainer will evaluate the trainee's ability to:

, use the standard greeting
, perform basic needs assessment
, provide correct and tailored information
, identify appropriate resources
, adhere to CIS policies
, offer materials
, collect data completely and accurately

Each trainee who successfully completes all components of initial training is considered qualified to perform their job duties without assistance, other than routine supervision and monitoring.

Scoring the Written Examination

Procedure

- Trainee completes the written Initial Training Examination Part I and Part II.

- Training Coordinator scores the examination using the answer key provided. If questions arise about how to evaluate an answer, the trainer may contact the appropriate Training Task Force member.

- When scoring the test, the Training Coordinator must remember that the written examination is designed to measure the basic information that trainees may be asked to provide. It is not designed to test the trainee's ability to memorize information exactly as it was presented. With this in mind, the Training Task Force has developed the answer key taking into account the range of correct answers for each open-ended question. The Training Coordinator is authorized to accept answers that fall outside those on the answer key, if they correctly answer the question.

- In order to pass the written examination, the trainee must score at least 85 percent as a total for both parts. If a trainee scores less than 85 percent or does not demonstrate proficiency in a particular subject area, the trainee will be given one or more additional assignments to complete to ensure that a standard level of knowledge is achieved. To maintain consistency with the network standardized training plan, Training Coordinators should consult with Annette Galassi in the Project Office.

- For trainees taking both Information Service and Partnership Program Part II exams, the score on each Part II should be added to the score achieved on Part I. There is no need to repeat Part I, but the trainee will have two separate scores, each one a total of Part I and the appropriate Part II.

- Training Coordinator ensures that the scored exams are placed in the personnel file of the trainee (do not forward to the Training Task Force).

Evaluating Standardized Calls

When placing a standardized call to an Information Specialist trainee, the Training Coordinator should establish conditions that simulate an actual telephone call to obtain cancer information. To simulate a real call:

- The Training Coordinator should place the call from a remote location, such as an office outside the telephone room.

- The trainee should have access to and be encouraged to use all equipment and resources available to an Information Specialist during routine work situations.

- The trainee should be asked to document the call appropriately using an Electronic Contact Record Form in the ECRF training site and to conduct appropriate follow-up activities.

To ensure a comprehensive evaluation of the trainee's abilities, the Training Coordinator should place three or four standardized calls to the trainee. The Training Coordinator or designated members of the regional office staff will evaluate the Information Service trainee's performance in responding to standardized calls, using the Call Monitoring Tool. To successfully complete the standardized calls, the trainee must a) consistently meet expectations for caller's information needs; manner of delivery; and adherence to policies, procedures and protocols, b) demonstrate a knowledge of and ability to use telephone equipment, c) access and use resources appropriately, and d) document the call using the Electronic Contact Record Form (ECRF). Although the trainee should demonstrate some knowledge of coding, it is not necessary for them to code the ECRF without error to pass the examination.

TRACKING TOOL

In addition to the exam and call scenarios, the Tracking Tool is an effective method whereby the Training Coordinator can track the trainee's progress. The following instructions provide the Training Coordinator with information about the use of the Tracking Tool.

The purpose of the Initial Training Tracking Tool is to document a Trainee's progression towards acquiring basic cancer concepts and working knowledge of the CIS. This evaluation process should be continuous throughout the initial training program. Currently, the Tracking Tool only has been developed for use with Information Service staff. Ultimately, there will be different versions of the Tracking Tool for each program area, reflecting the expected learning goals and objectives for Research and Partnership Program Staff.

For each training module, the Tracking Tool is used to evaluate whether the trainee has successfully attained competency (basic understanding) of the information contained in the module based on three key areas: **Core Concepts**, **Core Vocabulary** and **Appropriate Resources**. The Tracking Tool should be completed by the Training Coordinator at the conclusion of each module to determine whether the trainee has achieved competency in each module's content or requires additional instruction.

The **Core Concepts,** listed in each of the Tracking Tools, mirror the learning objectives from a particular initial training module. In order to help the Training Coordinator evaluate attainment of Core Concepts, the Tracking Tool provides an Assessment Tool Section. This section identifies activities and exercises in the training module that correspond to a specific Core Concept. The section activities and exercises should be assigned to the trainee (either during or after training on the module) and reviewed with them as part of the evaluation process. Trainers should use these tools to check concept competency.

The **Core Vocabulary** for each module includes terms that have been identified as essential for new staff members. Core Vocabulary may be expanded or deleted based on an individual trainee's education, knowledge of cancer, and/or personal experiences.

Appropriate Resources include a listing of documents and/or Web sites that are referenced in a particular initial training module. You are encouraged to add your own materials, including additional readings and exercises, to further tailor the training module to meet the needs of your regional office and trainee(s).

Training Coordinators should be prepared to answer questions, summarize and review module content, as necessary. The Tracking Tool provides a Trainer's Notes section to track the progress of each trainee. Suggestions for use of this section include:

- Quiz scores
- Areas needing improvement
- Positive feedback remarks
- Comments on skills attained
- Suggestions for additional work on topic

Finally, several of the Tracking Tools include a **Notes to the Trainer** section. This section lists additional games or exercises found in the Games Repository and/or CEs that can be used upon completion of initial training to strengthen or enhance concepts presented in the initial training module.

DOCUMENTATION

The Training Coordinator is responsible for documenting the progress of the trainee using the Tracking Tool and submitting the **Initial Training Summary** to the Project Office.
The Training Coordinator must also submit the **Final Exam Record** to the Project Office upon completion of initial training. The **Initial Training Summary** and **Final Exam Record** forms can be found on the TC Secure site of CISnet.

Upon receipt of this information, a certificate of completion is mailed by the Project Office to the regional office Training Coordinator.

TRAINING EVALUATION

Elicit feedback from trainees about your performance in terms of content and clarity of delivery, level of comprehension for trainees, and relevance of information presented to their work.

REVISING CONTENT

Throughout the course of training, you may come across information in the Initial Training Modules or Tracking Tools that needs to be updated and/or revised. The Training Coordinator should complete the appropriate form (**Module Revision Form or Tracking Tool Revision Form**) and submit it to the Project Office. The **Module Revision Form** and the **Tracking Tool Revision Form** can be found on the TC Secure site of CISnet.