

REFRESHER TRAINING

Optima offers program staff who have completed their basic training two different series of free, live webinars.

Refresher Training is for any program staff who wants a quick review, reminder or boost. These modules are designed to go over the different steps of Optima processes.

Your Refresher Training includes:

- A fast review of the most common tasks and responsibilities in Optima,
- Time limited - just 50 minutes! - and offered monthly,
- Engaging webinar formats with a live instructor,
- Multi-program format to encourage sharing of best practices!

Refresher Training is designed to be a “tune-up” for staff who have already been trained. Program staff who just want a quick review, a better understanding or want to check in will benefit greatly from the Refresher Training Series.

There are two different tracks: “**Back to Basics**” and “**Beyond the Basics**”

Back to Basics reviews the essentials of data entry and Optima usage. There are four classes:

- Effective and Efficient Case Initiation
- Inquiries and Applications
- Supervision in a Snap
- Maximizing your Staff Dashboard

Beyond the Basics expands Optima fundamentals coverings more advanced practices. There are four classes:

- Critical Data and Reports
- Teaching and Building Advocacy Plans (To Dos)
- Effective Marketing and Recruiting with Optima
- Creating Useful and Lasting Optima Training for Advocates

The next pages will assist you in finding and registering for the classes you want to attend.

Back to Basics

Module Title	Effective and Efficient Case Initiation
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Learn to enter case information quickly • Identify Critical Data Fields • Develop a plan for shared data entry with advocates
Registration	<u>Register Here!</u>

Module Title	Inquiries and Applications
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Develop a strategy for keeping inquires engaged • Define key Application questions • Develop a plan for tracking marketing information
Registration	<u>Register Here!</u>

Module Title	Supervision in a Snap
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Review the Supervisor Dashboard Components • Build a Supervision plan • Develop a plan for shared data entry with advocates
Registration	<u>Register Here!</u>

Module Title	Maximizing your Staff Dashboard
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Learn to enter case information quickly • Identify Critical Data Fields • Develop a plan for shared data entry with advocates
Registration	<u>Register Here!</u>

Beyond the Basics

Module Title	Critical Data and Reports
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Identify Critical Data Fields • Compare Reports and Data • Create a Reporting Plan for the program
Registration	<u>Register Here!</u>

Module Title	Teaching and Building Advocacy Plans (To Dos)
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Learn to construct To Do tables • Develop models of services • Construct Advocacy Plans
Registration	<u>Register Here!</u>

Module Title	Effective Marketing and Recruiting with Optima
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Learn the reports to track recruitment and retention • Develop a recruitment plan based on data • Organize data for marketing analysis
Registration	<u>Register Here!</u>

Module Title	Creating Useful and Lasting Optima Training for Advocates
Length	50 minutes
Module Goals	<ul style="list-style-type: none"> • Organize the Training Database • Develop a training plan for advocates • Establish a training protocol
Registration	<u>Register Here!</u>

CONTINUING TRAINING

Optima continues to offer for a fee program-specific, individualized training for new staff or as a refresher for existing staff.

Continuing Training is for any program who wants a more in-depth review, or need to train new program staff in a more in-depth manner. These modules are designed to go over the different steps of Optima processes.

The Continuing Training:

- Is a Comprehensive of the most common tasks and responsibilities in Optima,
- Program specific information and exercises included in each module,
- Engaging webinar formats with a live instructor,
- Time to review program specific procedures and requirements
- Includes handouts for building the program specific User Guide

Continuing Training is designed to be both a training for new staff and a “tune-up”; program staff who just want a quick review, a better understanding or want to check in will benefit greatly from the Continued Training Series.

There are three different services: “**Beginning**” “**Advanced**” and “**Wellbeing**”

Please see the following page for descriptions of each service.

If you would like to book any of the Continuing Training, please contact us by email at Robert@evintosolutions.com or send us a Help Desk Ticket at your convenience!

Continuing Training Services will build on your success and will help you get the greatest value from Optima. Continuing Training is designed for a program who needs program specific training for new or current staff, with a focus on the unique program needs.

TRAINING, BEGINNING

Starting from Scratch

The complete Nine Module Training, led by the Optima training staff. Designed to train newly hired staff and supervisors with no experience with Optima. Live webinar trainings, combined with handouts and Optima exercises help new staff to learn Optima.

New Staff Specialty Training

Since not all new staff need every training module, the New Staff Specialty Training allows programs to select the applicable modules: Administrative, Advocate Supervision, Recruiting and Training

Refresher Training

For program staff who have Optima training, the Refresher series is designed to review key Optima practices and renew staff's skill level. Additional handouts and new Optima exercises based on the program's practices will be used to deepen staff's Optima knowledge.

TRAINING, ADVANCED

Advanced Supervision Training

For Paid and Unpaid (peer coordinators, mentors) supervisors, an Optima training course designed on the effective use of Optima for providing excellent support, supervision, management and maintenance of advocates. Live webinar training and discussions will help supervisory staff identify key elements in Optima to use to improve supervision and volunteer experience.

Advanced Administrative Training

For administrative staff who want to operate Optima in a more effective and impactful manner, an Optima training course designed on the effective use of Optima for improving program performance measures focused on both reporting requirements and volunteer retention.

Advanced Training for Trainers

For program recruitment, training and development staff, and training designed for using Optima to track recruitment efforts and for implementing Optima training for new advocates, with special attention paid to the Optima Training Database.

WELLBEING

Wellbeing Set-Up, Table Construction, and Training with Assessment Design

Programs work with an Optima Trainer to design a unique assessment built within Optima. Program staff will learn who to construct the assessment in Optima, build the Look-Up Tables, and learn who to train advocates to complete the assessment.

Wellbeing Set-Up, Table Construction, and Training

Using an existing assessment, staff are trained to build the tables necessary and learn to train volunteers.