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ABSTRACT

The basic approach of this manual for trainers of welfare aides is the use of the trainee's experience and the conscious analysis of it. It encourages people to look at their job performance within the framework of experiencing, identifying, analyzing, and generalizing. Hints are given as to how to develop understanding of the organization, how to interview prospective trainees in small or large groups, and how to order and use the information gathered. How to develop an agreement with agency managers about training follows--then how to plan the training, covering specific goals, scheduling, optional techniques, use of outside resources, plan for evaluation, and relationships with co-trainers. Key areas are suggested for success: the entry process, contract-building, climate in the group, trainer's role, observation, working with other trainers, and using consultants. Discussion of evaluation by participants, by trainers, and by on the job experience follows. A Program Evaluation and Review Technique (P.E.R.T.) chart is included. (EB)

COMMUNITY ACTION TRAINING

A HANDBOOK FOR TRAINERS

Prepared By:
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INTRODUCTION

This manual is a guide and resource book for training in anti-poverty programs, community action groups and government agencies.

It aims to assist trainers struggling to bring meaning to such terms as maximum community involvement, effective service programs, and empowerment of the powerless.

In this manual we assume:

1. Your experience in directing training may be limited. At the least, however, you have taken part in community action activities or have worked as an organizer.
2. Your experience includes membership in several training groups. (If you have not been a learner in a training group, you will have difficulty understanding how people learn in group situations.)
3. Your objectives are:
   a. To help people learn to perform their jobs more effectively—to develop their skills, increase their awareness of *how* they do jobs and clarify *what* they want to do in their jobs.
   b. To help the organization or agency function more effectively—to develop ways for persons to work together, allowing each person to contribute as much as he can to the work of the whole group.

The manual recognizes that effective training often depends heavily on human qualities and group process. Beyond those elements, however, good training requires thorough preparation and coordinated structure.

A good trainer must be able to—

—determine real training needs
—plan training around specific goals
—carry out training effectively
—evaluate performance

The Community Action Training Institute stands ready to back up the manual with technical assistance or training of trainers, where feasible.

Feedback is needed, however, if future variations of the manual are to be more useful.

Please write to us. Use TH-6 to refer to this manual.

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Attn: Materials Development Unit

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I. FRAMEWORK FOR TRAINING

Training community action staff and volunteers is as new as community action itself. Training concepts are still evolving, to reconcile the dynamics of street action with skills development and attitudes.

Good training helps people perform their jobs more effectively in relation to their specific functions and to the agency as a whole. The factors that have a bearing on job effectiveness include:

1. **Knowledge (information).**
2. **Skills**
3. **Actions**
4. **Interpersonal relationships**
5. **Job satisfaction**

Training directed at these factors must take into account the kind of people involved in the training—

—the trainers as well as the trainees

—people who have experienced poverty, ghetto life, and discrimination.

Traditional class training approaches such as lectures and note taking have little relevance to the experiences of such trainers and trainees. Experience and conscious analysis of experience have been found more effective by far.

The use of such experience and analysis as a training method is the basic approach of this manual. It encourages people to look at their job performance within the following framework:

E—Experiencing	anything that is happening here and now.
I—Identifying	looking at the *experience* to see what things have been going on, what people have been doing, thinking and feeling.
A—Analyzing	figuring out why the things identified are happening; what causes what.
G—Generalizing	seeing what can be learned from the *analyzing,* what might be done differently under similar conditions; what is likely to happen if certain parts of the *experiencing* are repeated; what can be learned about other situations, on the job, at home, with friends.

Training is any pre-planned learning experience which uses the *E*xperiencing, *I*dentifying, *A*nalyzing, *G*eneralizing (EIAG) framework to help people learn, as shown in Example 1.

EXAMPLE 1

Training Welfare Aides in Interviewing Skills

E—<u>Experiencing</u>	Trainers take parts role-playing a welfare client and a welfare aide for two 3-minute interviews, demonstrating poor interviewing techniques and effective techniques separately.
I—<u>Identifying</u>	Participants point out what happened in the two interviews. What was said? Who did most of the talking? How did the recipient seem to feel?
A—<u>Analyzing</u>	Participants explain why things happened the way they did in each interview. How did the client's feelings affect her answers? How did the aide's words seem to affect the client's feelings?
G—<u>Generalizing</u>	Participants see what can be learned from their analysis. Do the feelings of a person being interviewed affect his answers? How can an interviewer's words affect feelings?

Using their own generalizations from the above EIAG sequence, participants repeat the process doing role plays themselves to develop their own skills.

The following pages are a guide for designing and producing training sessions using the EIAG approach.

II. LOOK FOR TRAINING NEEDS

A. Gather Information

To develop an effective training program, the trainer must have an accurate picture of what people's learning needs are. You may not deal with all of these needs, but you must know them in order to choose which you will attempt to fill.

1. Look at the Whole Organization

When you look for training needs, develop an understanding of the organization as a whole, even if you expect to train only one or two groups. Groups and individuals seldom work alone. They are part of a network of interdependent relationships, business and personal. Training planned for one group without knowledge of the rest of the organization may cause difficulties for the members of that group. (See Example 2.)

EXAMPLE 2

Training Group Within An Organization Can Cause Friction With Other Parts

1. In an organization which finds jobs for "hard core unemployed" you train counsellors to understand how personal problems can affect on-the-job performance of their clients.

2. Job developers complain that some of these clients are not showing up for jobs the developers worked hard to get for them.

3. The counsellors try to explain that personal problems are causing absenteeism.

4. The developers see the counsellors as being "soft" on the clients; developers get angry at the counsellors and complain to the director.

2. Things to Look For

a. What are the existing jobs and job groupings?

b. What *relationships* are necessary for the organization to function effectively? What ones now need improvement?
   i) the organization and the community
   ii) the organization and its Board
   iii) the organization and other agencies
   iv) different divisions, departments and work groups
   v) supervisors and their subordinates
   vi) people who work together as a group
   vii) the organization and a labor union (if any).

c. *Communication* within the organization. How is it done? Does it work well? If not, where and what are the problems?

d. *Decision-making, setting policy, planning.* How are these things done now? Could the methods be improved? What are the problems? Do decision-makers know how to take a problem-solving approach?

e. *Individual training needs.* What skills and knowledge are needed? What specific relations with others need development? What are the development needs of specific individuals?

f. What the members of the organization personally want to accomplish and what they see as the objectives of the organization. Examine with them their objectives and the obstacles to reaching those objectives as a basis for deciding what training might be most useful.

You may conclude after looking at training needs that some training for everyone in the organization would have better results than training for just one group. You will then have to decide whether to recommend this at first or wait until you have demonstrated the usefulness of training with one group.

3. Ways of Looking for Information

a. Talk with individuals (Example 3).

b. Group sessions:
   i) group interviews (Examples 4 and 5)
   ii) setting goals and defining problems (Example 6)

c. Observe the organization at work.
   i) staff meetings (Example 7)
   ii) work groups
   iii) one employee—especially one whose decisions and work style affect many people in the organization.

d. Interview supervisors and management officials responsible for the trainees' work.

e. Questionnaires you may wish to make up and distribute.

f. Familiarize yourself with job descriptions, program reports, and job objectives set by the sponsor's internal policy or funding sources.

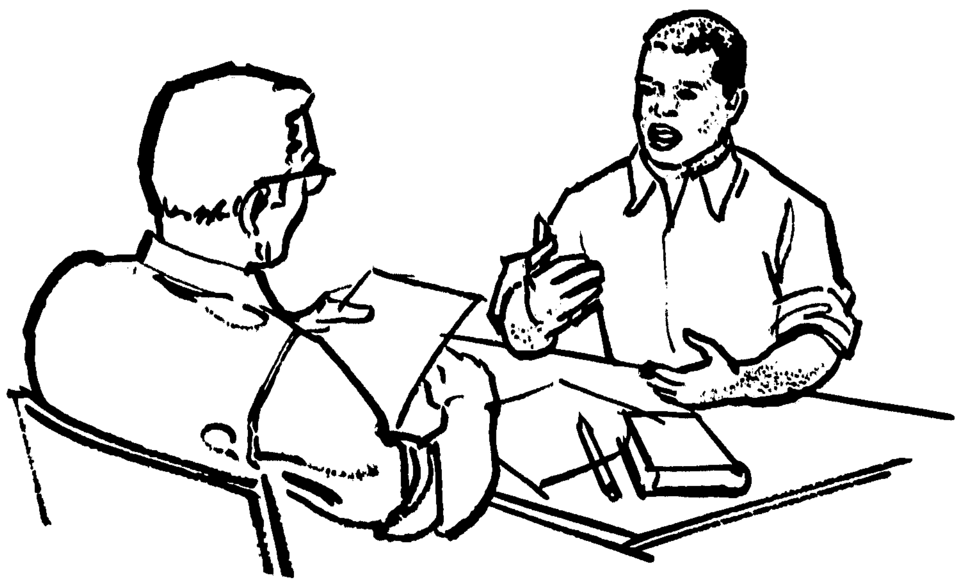
4. **Barriers to Getting Information**

   a. People react against you when they think you are a judge of their work.
   b. People are too close to their own problems to see them.
   c. People are reluctant to talk about their shortcomings. When there is competition some may feel that admitting their needs will cost them their job.
   d. People see you as an "outsider" who can't possibly understand "our" problems.
   e. If you are a staff member of the organization, people think, "What makes him know more than we do? He can't tell *us* anything."
   f. Your own desires and ideas make it hard for you to see what the problems and training needs really are and which are most important.

Here are some suggestions for interviewing, conducting group sessions and observing.

EXAMPLE 3

Interview an Individual



To put the person at ease, let him know why you want to talk to him. Explain that you need to know what he thinks would help him on his job before you can plan any training programs. Then see if he has any questions he wants to ask you. Avoid a straight question-and-answer situation if you can. Help the conversation develop into a discussion of how he sees his work, what he is trying to do, what pleases him about his job, what he likes doing, what problems he runs into, what is frustrating about the job, what help he could use, what skills would be useful, what would make his job easier. Do not judge or give opinions about what is good or bad, right or wrong. Your job is to *listen* and *understand* his way of seeing things.

EXAMPLE 4

Interview a Small Group

This method is helpful because the people talk to each other rather than to the trainer.

Step 1: Have a meeting of the people you will be training. Divide participants into groups of three's or four's. Ask the small groups to talk together on the following: (only give one statement at a time)

15 min. — Where do you get your greatest satisfaction in your job? What do you like best about your job?

Next statement:

15 min. — What gives you problems in your job? What makes you really frustrated? What do you dislike most about your job?

Step 2:

15 min. — Have each trainee complete the following sentence on a piece of paper and then share with the small group:

If I knew how to:

(1)
(2)
(3)

I would be more efficient and effective in my job.

Ask the small groups to list their most important training needs.

Step 3:

15 min. — Now, in the total group, share lists and discuss training needs. Give your observations and comments, too.

During Steps 1 and 2, move around, listen to discussions. Take notes, unless you discourage them from talking freely.

EXAMPLE 5

Interview a Large Group

Tell the group you'd like them to think silently for a few minutes about their jobs.

(Pause)

What do you want to accomplish in your job? What do you most want to do in it?

(Pause)

What would give you a sense of achievement in your work? Give you a feeling of really having done something worthwhile?

(Pause)

Now think of what would help you to be more effective in your job, to be better at it in the way *you* want to be?

(Pause)

Ask them to write what they need to be effective in their work on an unsigned piece of paper. Collect and list the needs on a blackboard. Training needs can then be grouped together and put in order of importance by the group.

EXAMPLE 6

Set Goals and Define Problems with a Large Group

<u>Step 1:</u>

45 min. — Divide participants into small groups. Have the small groups express in specific terms the goals of the organization or their section of it.

"What do you want to achieve? What specific ways do you have of measuring the degree of your achievement"?

Help the group express goals in specific rather than in vague, uncertain terms.

<u>Step 2:</u>

30 min. — In the total group, using a blackboard, share goals and rewrite or select the best.

<u>Step 3:</u>

60 min. — Small groups then discuss obstacles to achieving the objectives.

30 min. — In total group, members share obstacles and help decide their training needs.

EXAMPLE 7

Observe a Staff Meeting

1. How much participation is there and who does most of it?
2. How open are people?
3. What is the general atmosphere:
   tense, friendly, bored, resentful?
4. How are decisions made?
5. Where do people sit, who sits with whom?
6. Non-verbal behavior: what are people doing with their hands, how are they sitting, what are the expressions on their faces, where are they looking, and so on?
7. How much do people really listen?
8. Are problems shared with the group or just presented as information or complaints?
9. How much do people build on each other's ideas, rather than ignoring those ideas and presenting their own?

B. Arrange and Use the Information

Once you have collected information, arrange and use it to define specific training needs and to decide which ones you will deal with.

If the organization is small and a small group interview is your information source you can gather and arrange the information at the same time. For larger organizations, arranging is more detailed work. Putting information on index cards and then sorting them into main categories will help you order the mass of information. (See example 8). In any case, develop some way of arranging the facts, feelings, opinions, and ideas you have gathered. Your arrangement serves as a guide to defining training needs.

EXAMPLE 8

Categories in Which to Put Index Cards Containing Information on Training Needs

People to be trained

Their feelings - how do they feel about their work in general, about training? How much do they want training? How committed will they be to learning?

Their knowledge- what do they know about their jobs? What do they need or want to know to help them do their jobs better?

Their actions - what are they good at doing? What do they need help in?

Their relationships with each other - how do they get along with each other?

Their supervisors and higher-up management people

What do these people want or expect the trainees to learn? How do they feel about the training?

Trainers

What special abilities do you have? What do you think the trainees should learn? How much do you expect them to learn? What are the relationships among the trainers?

Prepare a list of training "needs" from your arrangement of the information, as shown below.

Questions to Guide Preparation Of a List of Training Needs

What Things do the Trainees Want to Improve?

The trainees will be the most enthusiastic about training which helps them with what they want to improve. People learn best what they want to learn. What are people most dissatisfied with in their knowledge, actions and relationships with each other? Are there any areas all the trainees want to improve? Are their ideas of what improvements are needed the same as your ideas about their training needs? Do you have the abilities to help them in these areas?

What New Skills or Ways of Acting Will the Trainees Need to Accomplish Improvements?

If they want to understand some things or improve their relationships with each other, are there any specific changes in behavior you think they will need to learn?

Trainer's Experience and Abilities

What training do you think the trainees need most? Is it what they want? Do you have the abilities to give them this training? Can you get the resource people and materials to help you do this training?

Time

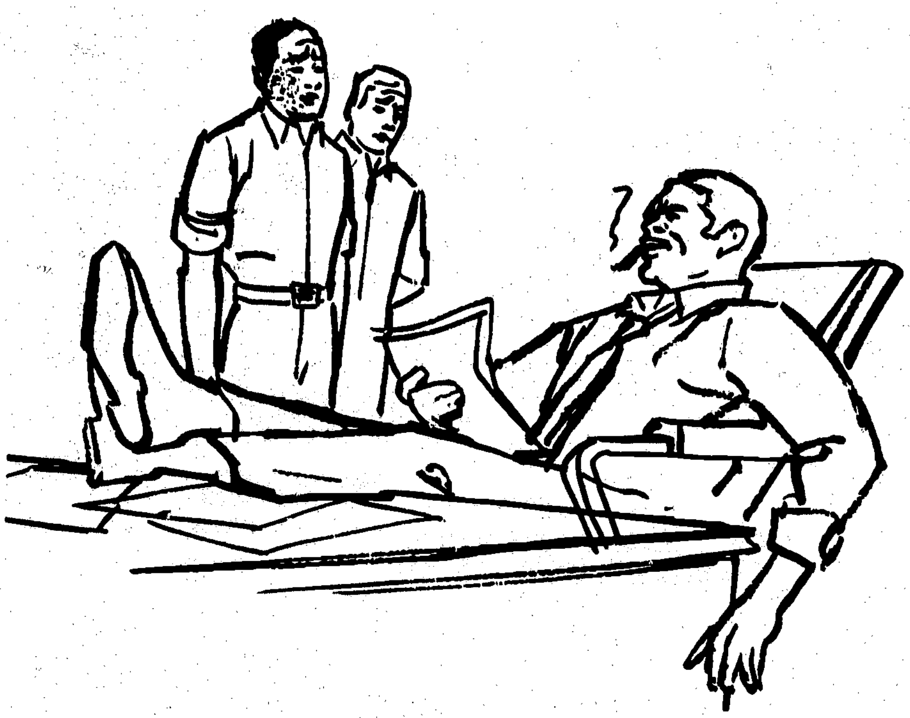
Is there enough time available for you to help people learn what they want to learn, what their supervisors want them to learn, and what you think they need to learn? What training can you accomplish best in the time you have?

List training needs in words which describe the *general* directions in which training will move people, as shown in Example 9. *Specific* training goals, which indicate how you will measure progress toward your objectives, are defined later in the program planning sections.

EXAMPLE 9

Training Needs of Welfare Aides

1. Aides need more information about welfare regulations.



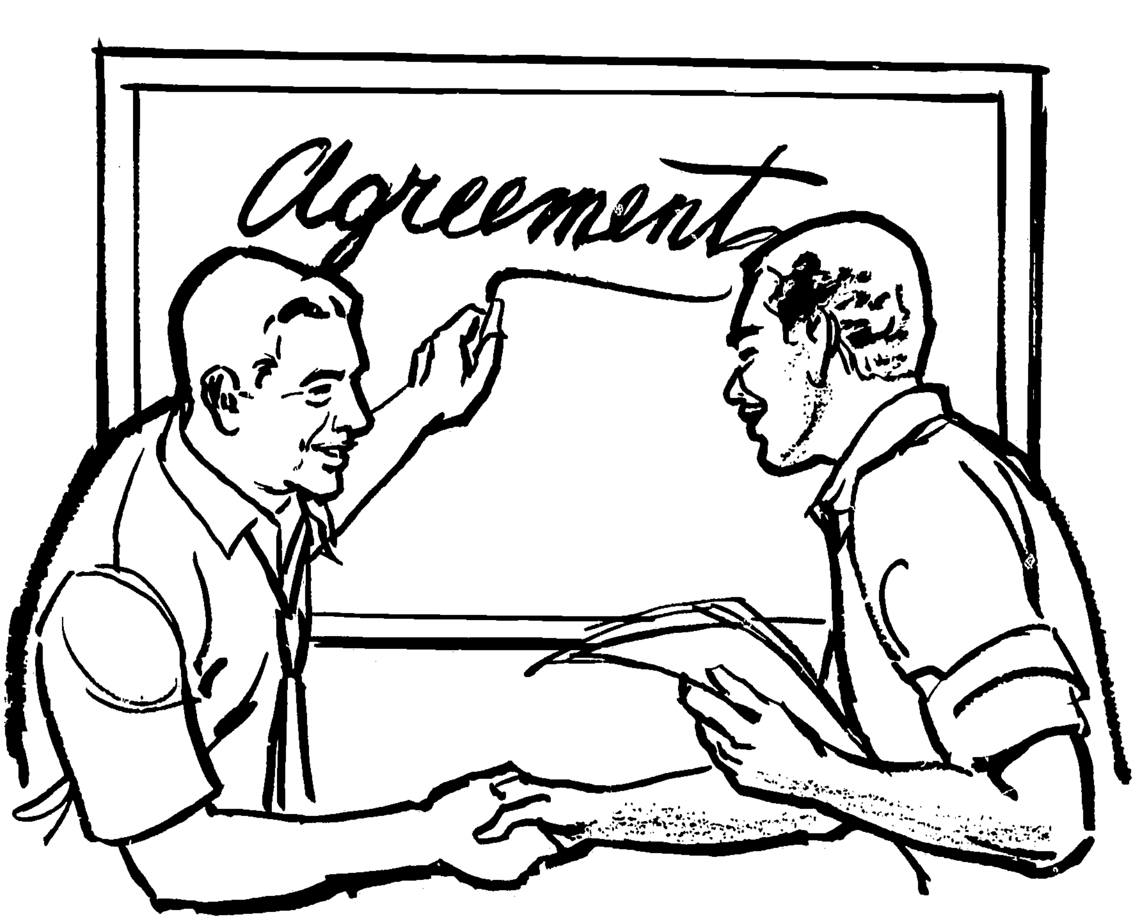
2. Aides need to improve their ability to interview welfare clients.
3. Aides need skill in working with groups of welfare clients.

III. SPONSOR - TRAINER AGREEMENT ON OBJECTIVES AND RESOURCES

When you have a rough list of the major training needs, arrange a meeting with the person(s) who brought you in as a trainer and, if possible, with the people to be trained.

At this meeting:

1. Present your list and revise it with their suggestions so the list becomes in part theirs.
2. Give the agency managers and trainees a clear idea of what training is, what it can do, and what it can't do. Encourage the agency managers and the trainees to express their concept of training.
3. Find out:
   a. the time they will commit for the program
   b. where they prefer the training to take place
   c. what resources they will make available
   d. the money (if this has not already been decided upon) available for hiring consultants, renting special equipment, and other costs.
4. Reach a **clear agreement** on the general training objectives and the committments you and the organization will make.



IV. PLAN THE TRAINING

Your training commitments and the sponsor's needs should be worked into an overall training plan, consisting of three basic building blocks:

1. *Training Goals:* A statement of what the trainees will be able to do after training, how well they'll be able to do it, and what they'll need to do it with.
2. *Curriculum:* A statement of what training techniques will be used and how. Include a general indication of the time, in hours, you plan to use.
3. *Time-Content Sheet:* A detailed breakdown of the curriculum, by steps and minutes per step.

A. Form Specific Training Goals

A training goal is a specific statement of what skill or skill improvement the trainees will have after training. Such goals should be stated in terms of performance of the trainee and should be measurable. A properly formulated training goal should state: (Example 10):

1. What skill or performance the trainee will have after the training.
2. The minimum level of achievement in such skill or performance the trainees will reach; and
3. The conditions under which the trainee will demonstrate his skill.

EXAMPLE 10

Formulating a Training Goal

Assume that one of the specific training needs has been determined: "The Aides need to improve their ability to interview welfare clients." To prepare a training goal:

A. Answer the three basic questions:

1. What will the trainees be able to do?
   —Interview a welfare client
   —Complete his agency's data sheet on the client
2. How well will the trainees be able to perform?
   —*Successfully* interview, *without* hindering responses.
   —*Accurately* complete the sheet, *after* the interview.
3. Under what conditions will the trainee demonstrate his skill?
   —In a problem situation.

B. Combine the answers into one statement: Given a problem situation, the trainees will be able to successfully interview a welfare client without hindering responses and, without the aid of notes, accurately complete the agency's data sheet.

Prepare a simple, direct statement of each specific goal for the training program (Example 11). Then see how well each one passes the following tests:

1. Is it clear? Stick to one goal and keep the statement direct, simple and short.
2. Is it relevant? Does it meet the real needs of the people you will be training? Does it start with where they are now?
3. Can the trainees accomplish it? Though they may need more practice and retraining later, the trainees should be able to make satisfying, measurable improvement during one session.
4. Does it improve performance? Focus on helping people improve the way they act, rather than changing their ideas, knowledge, attitudes or beliefs alone.
5. Is it measurable? Part of the planning is designing the specific ways in which you will measure or evaluate how fully your goal has been achieved.
6. What information do you have that shows that these people need to achieve this goal?
   a. their past actions
   b. ideas they have expressed.
   c. feelings they have expressed

EXAMPLE 11

Specific Training Goals Formed From the Training Needs in Example 9

Training Needs #1: Aides need more information about welfare regulations.

Specific Goal #1: Given five short written case descriptions, trainees will be able to apply their knowledge of welfare regulations in describing what they would do and why. Minimum acceptable performance will be measured by awareness of specific regulation provisions.

Training Needs #2: Aides need to improve their ability to interview welfare clients.

Specific Goal #2: Given a problem situation, the trainees will be able to successfully interview a welfare client without hindering responses and, without the aid of notes, accurately complete the agency's data sheet.

Training Needs #3: Aides need skill in working with groups of welfare clients.

Specific Goal #3:

a. working in groups of five or six persons, trainees will define one community problem and develop written plans to deal with the problem using the specific procedure taught during the training program.

b. trainees will then use the IAG approach to examine the *E*xperience which took place during the process outlined in 3a. and will prepare a list of their *G*eneralizations.

B. Block Out a Schedule

The training needs you discover may call for a single session covering one topic, or for a series of sessions covering numerous topics related to your overall training goals. Example 9 lists three training needs discovered after analysis.

You must determine how much training time will be necessary to meet them; one day, a half-day or perhaps one day a week for several weeks.

Using Example 9, you may decide that each major need requires a full day of training. The sponsor agrees but cannot allocate three consecutive days. You agree to structure training on a one day a week basis.

At this point, an overall schedule should be prepared. This schedule should establish the sequence of training sessions, length of sessions, and locale. Sessions should be ordered so one builds upon the other in logical sequence.

C. Explore Optional Techniques

1. Take each training goal and think of anything you can, no matter how unusual, that might help the people you will be working with to achieve that purpose. Don't back away from new ideas. The more creative you can be, the more likely you are to hit on something just right for the particular group you're working with. If you have gathered the information on training needs carefully, your thoughts about what training methods might work are the most useful guides you have to coming up with a good training plan. If there is more than one trainer, do this brainstorming together. Write your ideas down on a blackboard.
2. Some common techniques used in training are:

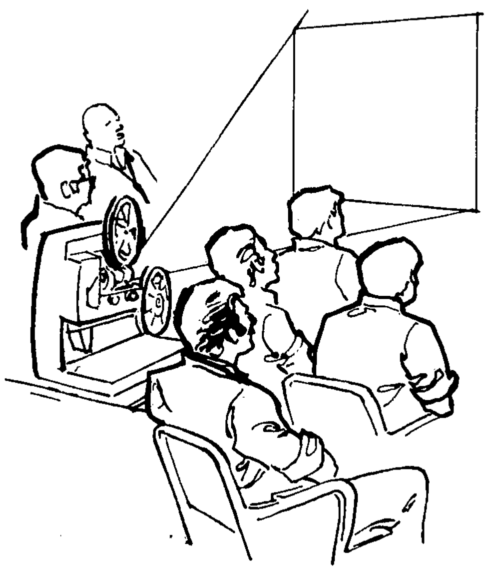
guided group discussions
group problem-solving exercises
buzz groups

role plays
structured role plays
role reversals

group dynamics analysis
non-verbal exercises

discussion stimulators
case studies
films and tapes
written exercises

brainstorming
task analysis
process analysis
fishbowl (group observing group)



3. Descriptions of these and many other training methods and techniques can be found in the following publications:

a. *Learning to* ***Work*** *in* ***Groups*** *by Matthew B. Miles. Teachers College Press, Columbia University, New York, 1959. Paperback $2.25*

(Planned learning situations, studying group behavior, relating training and job experiences.)

b. *Joy by William Schutz. Grove Press, New York, $5.50*

(Communications improvement, non-verbal exercises, personal encounter, personal growth.)

c. ***Facilitating Devices for Use in Training Groups*** *Leadership Consulting Service, Boston University, Boston, Massachusetts, 1967. Mimeographed, 25¢*

d. ***Handbook of Staff Development and Human Relations:*** *Materials Developed for Use in Africa. by Donald Nylen, J. Robert Mitchell, and Anthony Stout. The National Training Institute for Applied Behavioral Science, Washington, D.C. and The European Institute for Trans-National Studies in Group and Organizational Development, Copenhagen, Denmark.*

D. Construct the Plan

Now with your ideas in front of you, sort out what you will use and prepare a training plan outline. Here are some basic pointers to keep in mind:

Guidelines for Planning a Training Program

No matter what particular type of program you use to achieve your specific training goals, there are certain basic guidelines to follow.

- People remember and use ideas and information which they *get for themselves.* Make sure you include in your plan many opportunities for people to *E*xperience something (preferably their old way of behaving and an improved way of behaving). *I*dentify just what is going on in that situation. *A*nalyze why these things happened. *G*eneralize what can be learned from this experience and used in other experiences.

- Trainees should have a chance to actually *try out* the new behavior *themselves,* rather than watch others do it.

- People will take in more and "digest" it better if they move through the training in *small steps. . . .*
- . . . and if they have plenty of time to *practice* their new skills.
- Usually people need at least as much time for each of the last three steps of learning as they do to have the *E*xperience.
- The IAG part will be more effective if it comes right after the *E*xperience while the *E*xperience is still fresh in everyone's mind.

Example 12 shows an outline based on these guidelines.

EXAMPLE 12

Training Goal: Given a problem situation, the trainees will be able to successfully interview a welfare client without hindering responses and, without the aid of notes, accurately complete the agency's data sheet.

Training Plan Outline

1. **Demonstrate interview process—show film**
2. **Identify, Analyze, Generalize the film**
3. **Trainees role play interview process**
4. **Identify, Analyze, Generalize the role play**
5. **Discuss non-directive interviewing: use**
   a. **written exercises**
   b. **tape recorded exercises**
6. **Trainees practice interviewing—role playing**
7. **Trainees evaluate exercises**
8. **Summary and review**

After outlining your plan, review it for the following points:

1. Does this plan follow the guidelines?
2. Can the goal realistically be met by this plan, given the trainees, "where they're at," and the circumstances of the training?
3. Does each part of the plan contribute to your purpose? Does each step lead into the next one? Do the later steps build on learnings acquired in the earlier steps?
4. Could any method do as well or better? If so, should it be used?

E. Use Outside Resources

The use of outside persons (consultants) or special materials is often desirable. Choose resources and plan their use carefully. Some basic information on consultants and materials follows:

1. **Consultants**

   A Consultant is a person, any person, whom you invite to take some role in carrying out your training program. He may be a chief of police or a dope addict; he may be available at a high fee or he may volunteer to help. His role and fee should be established in the development stage of your program.

   a. *Use Consultants when:*
   —a "name" the trainees respect will stimulate their interest
   —training in a particular skill calls for someone experienced in that field
   —you want to present contrasting attitudes
   —you want to introduce both sides of a controversy
   A consultant's appearance should be timed in clear relationship to materials, films, other consultants, and subsequent training experiences. Read "Using a Consultant" in the "Carrying Out the Training" section on page V-4 for suggestions on consultants participation in the session itself.

   b. *Choosing a Consultant.*
   You have decided above what role you want the consultant to play, and roughly the kind of background or experience that role calls for. Now find someone who fits that description.

   Seek out sources of good consultants. Ask for suggestions from the training sponsors, local community action agencies, civil rights groups, unions and colleges. Keep evaluations of consultants you use for resources in developing subsequent programs.

2. **Materials**

   Materials used in training programs range from pamphlets and mimeo sheets to color films or slides, tape recordings, graphs and charts. Some guidelines about materials and their use:

   a. ***Check available resources.*** Your library, the U.S. OEO Library, and the catalogues of various federal and state agencies list films and materials which have been developed for training purposes. Local TV stations, movie houses and radio stations may have useful films and tapes. Private firms specializing in film libraries will provide you with catalogues and prices on request. The N.J.C.A.T.I. maintains a library of such resources. Also, available from C.A.T.I. is "Tape for Real Community Action" a booklet on creative ways to use a tape recorder.

   b. ***Preview all materials.*** If you show a film, play a tape, or introduce a booklet, be fully familiar with the material before using it. Know the length of a film, its contents and major points. Make sure the materials you plan to use are easy to understand, and will definitely help to achieve your training goal.

c. ***Plan when and how materials will be introduced.*** Don't hand out a series of pamphlets if you plan to use only one during the training. Decide whether you want to distribute printed materials before, during, or at the close of the session. Fit materials into the training plan at those times the group can learn the most from them.

d. ***Use materials as an Experience which the participants can can then Identify—Analyze—Generalize.***

F. Plan for Evaluation

Work into your plan ways to find out how well each training goal has been achieved. Some approaches to evaluation are:

1. **Trainer's evaluation**

In your training plan include times for the trainers to get together regularly outside the actual session. Schedule coffee breaks, meal times, etc. so that trainers will be free to confer with each other every 2 or 3 hours. For guidelines to use during and after the sessions, see "Observing During the Session", page V-3 and "Evaluation by Trainers", page VI-4.

2. **Participants' Opinions, Attitudes and Behavior**

Gather this information during training, at completion and when the trainees are back on their jobs. For some suggested methods see "Evaluation By Participants", page VI-1 and "On-The-Job" Evaluation", page VI-5.

a. Schedule definite times for participant evaluation.
b. Plan training steps in such a way that the last step measures the trainee's achievements against the training goal.
c. Plan to introduce evaluation to the participants.
Explain:
—what the evaluation procedure is
—why evaluation is needed.
Trainees must know they will not be marked, graded or judged on the basis of the evaluation.
d. Work out evaluation procedures. Decide what methods to use. Prepare the exercises and write out the forms. Examples 15 and 16 are standard forms which can be used after any training session. Design specific procedures useful to you in measuring how well training goals were achieved.
e. Plan to ask supervisors and co-workers to evaluate participants *before* training begins (with a follow-up after training is completed). Arrange a meeting to explain your purpose and record their evaluations.

G. Formalize Your Plan

If you plan a multi-session program, prepare a curriculum from your individual Training Plan Outlines. (See Example 12.) Check for repetition in use of materials, duplication of topics, or overreliance on any one technique. (See Example 13 for a training curriculum.)

EXAMPLE 13

Training Curriculum for Welfare Aides

Welfare Regulations (5 hours)

Lecture and guided group discussion will be used to review local welfare regulations. Following a brief introduction, a panel of representatives from the Welfare Department and the City Wide Welfare Rights Group will outline eligibility requirements, welfare budgets and fair hearings.

Thomas Brown, Joseph Smith, Robert Williams

Interviewing Techniques (6 hours)

This session deals with interviewing techniques used for eliciting and giving information. After an introduction to the session the film "Working with People" will be shown and the trainees will be asked to list the techniques successfully used in the film. In a role play, one trainee will act as a welfare aid, another as a welfare client with a budget problem. The trainees will be asked to critique the role play with the list developed from the film and add any new technique developed in the role play. The trainer will outline some non-directive techniques, using examples from the film and role play. More role plays will be used and tape recorded, building on the techniques discussed. The session will be summarized by devising a "checklist for interviewing" from the film and role plays.

William Jones, Ted Simpson

Organizing Welfare Clients (6 hours)

Brainstorming and group discussions are used to develop strategies for organizing. The session opens with the group brainstorming a list of issues around which welfare clients might be organized. The list is refined by the trainer and buzz groups are formed to develop a strategy for organizing around one of the issues. Each group outlines its report on newsprint and presents it to the total group. The trainer leads a discussion on each of the reports and summarizes some of the basic shortages of organizing.

Jack Wilson

Next fill in the outline of each training session so that you have a detailed map of how the whole session will run. (See Example 14.) Keep in mind the following points.

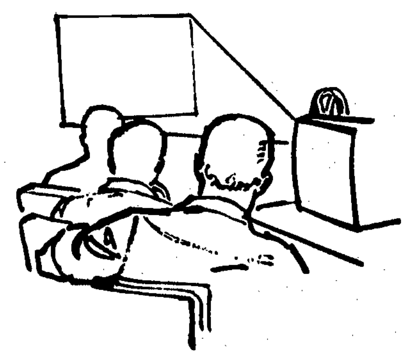
1. Write in enough detail so that what will be going on during each step is definite and clear.
2. Write a time schedule for the program, allowing specific amounts of time for each step.
3. If there is more than one trainer, work out what each one will be doing during each step.
4. Practice your plan with all the trainers—go through a "dry run." Make any changes that seem necessary.

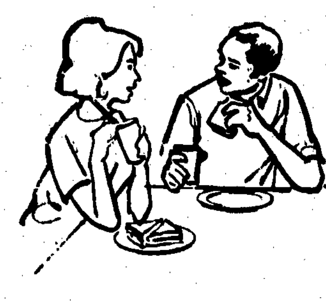
EXAMPLE 14

Curriculum

This session deals with interviewing techniques used for eliciting and giving information. After an introduction to the session the film "Working with People" will be shown and the trainees will be asked to list the techniques successfully used in the film. In a role play, one trainee will act as a welfare aid, another as a welfare client with a budget problem. The trainees will be asked to critique the role play with the list developed from the film and add any new techniques developed in the role play. The trainer will outline some non-directive techniques, using examples from the film and role play. More role plays will be used and tape recorded, building on the techniques discussed. The session will be summarized by devising a "checklist for interviewing" from the film and role plays.

Training Plan:





Time	What	How
15 min.	Introduction	Outline session: film, role plays, IAG process, tapes and written exercises, "helping" and "hindering" behavior.
60 min.	Demonstrating interview process, including effect of feelings and difference between "helping" and "hindering" behavior.	Show film, "Working with People," a series of role played interviews; trainees IAG during film, which can be stopped after each role play; trainees develop list of "helping" and "hindering" behavior and an outline of interviewing steps.
15 min.	Try out new behavior.	Trainee pairs each do a 2-minute role play interview. Each IAG's his own interview; other does not criticize.
15 min.	Break	
10 min.	Summary	Trainer interviews the group, using interview approach taught in this session; trainees add to or modify helping—hindering list.

Time	What	How
20 min.	Develop ability to identify "hindering" and "helping" behavior.	Written exercise—brief client statements and several possible responses from which trainees can choose.
45 min.	Develop ability to create "helping" responses and questions.	Tape recorded exercises on non - directive interviewing style, in which trainees respond to the tape.
60 min.	Lunch	
15 min.	Summary	Trainer interviews group; trainees add to or modify helping-hindering list.
45 min.	Practice in interviewing.	In trio's trainees each do three 2-minute role play interviews; each IAG's his own process and then asks the other for help after each interview. Trainees take turns as interviewer, client and observer.
30 min.	Developing ability to create "helping" responses and questions	Tape recorded exercises on non - directive interviewing style.
15 min.	Break	
15 min.	Summary and review.	Trainer interviews group; trainees add to and modify helping-hindering list.
45 min.	Trainee evaluation exercises.	Trainee trio's take turns in doing 3-minute role plays. For each, the process is the same: Role play (with information about client provided by trainer) true-false questionnaire by interviewer and rating of "hindering" responses by observer. Anyone who needs a second role play can do so, if time permits.
30 min.	Summary and review.	Trainer and trainee conversation in which outline of interviewing steps and the helping-hindering list are completed.

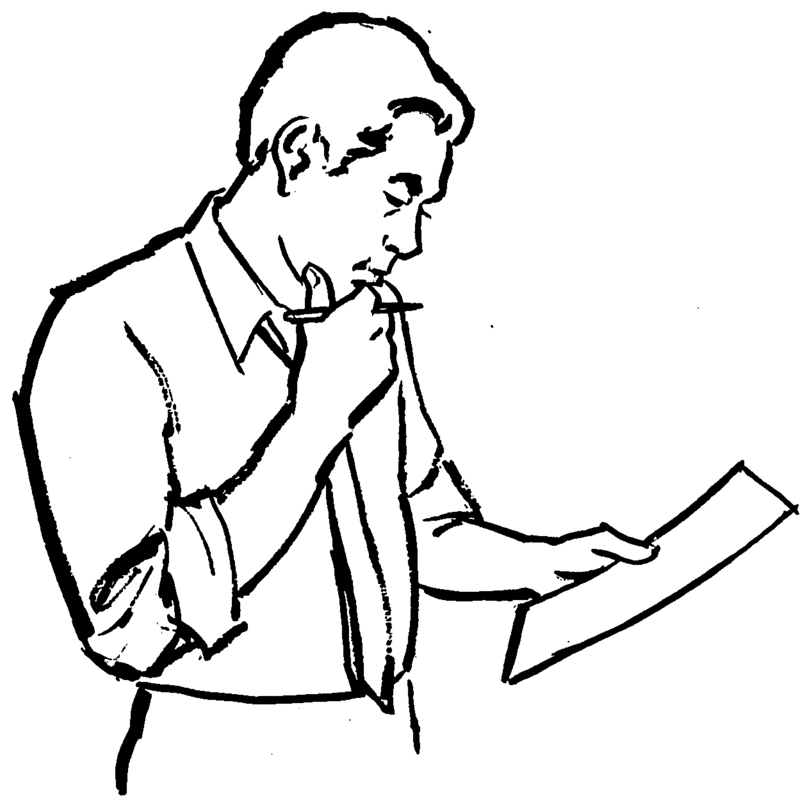
H. Establish Your Co-Trainer Relationships

Cover the following points with your co-trainers *before the session* to insure coordination.

1. Go over the training plan and each trainer's part. Discuss your own and each other's strengths and weaknesses. Make sure there is consensus about what each trainer will be doing. See that each trainer is comfortable with his role in the session.
2. Discuss problems among the trainers which they feel may come up during the session. Talking about feelings of rivalry and competition before the session may avoid later problems.
3. Decide how you will handle differences between yourselves that happen during the session.
4. Share anything important you think your co-trainers should know about the group, the background of the training session, and problems that may come up.

I. Training Arrangements

Before a training plan can be carried out specific arrangements must be made. The person making the arrangements must know the training plan well enough to make decisions on unforeseen matters. The following checklist is handy to use.



TRAINING ARRANGEMENTS CHECKLIST

	OK	NEEOS MORE WORK	FOLLOW-UP NOTES
Materials –prepare or obtain materials you will need, such as information sheets, articles, questionnaires, tapes, and movies.	☐	☐	
Resource persons–contact people you plan to use and make sure they can participate. A confirmation letter should specify dates, times, place, transportation, expected contribution to programs and fee.	☐	☐	
Place —choose the place based on convenience for participants. Check availability, prices, eating facilities. If you plan to use movies or slides make sure the room can be darkened. Make arrangements for seating, tables, film projector and screen, podium, ashtrays, drinking water, ventilation, blackboard, easel and other facilities.	☐	☐	
Food –arrange for meals and coffee breaks, if necessary.	☐	☐	
Transportation —arrange transportation to the training place, if necessary. If participants provide their own transportation, send travel instructions. Prepare instructions carefully or you will start the program with angry participants.	☐	☐	
Supplies—name tags, paper markers, pencils, evaluation forms, newsprint, masking tape, tape recorder and tape, etc.	☐	☐	
Technical help—know how to operate the film projector, tape recorder, and other special equipment you will be using, or have an operator handy.	☐	☐	
Publicity—check that the program has been adequately publicized.	☐	☐	
Advance preparation–give participants as clear an expectation of what will happen as you can. Advance reading can sometimes be helpful.	☐	☐	

V. CARRY OUT THE TRAINING

You now have a set of objectives, specific training goals, and a detailed plan for achieving those goals. As you initiate your training session, stay alert and responsive to the group. Some key areas merit special attention to insure success:

A. The Entry Process

You may encounter initial skeptcism, reserve, or hostility from the training group particularly if its members were not involved in previous training with you or in the development of the program. If you sense such an attitude, a break-the-ice approach helps.

—Ask for questions from the floor, about you or the training. Answer them fairly.

—Don't consider yourself "superior" and, thus, make them feel "inferior". If you can relate as a human being, they will be more open to learning from you. When the group is relaxed, go into such questions as what they have come for, what they like about their jobs, what problems they have. Feelings they have against training will usually come out. Deal with them honestly and openly.

Special problems have to be dealt with. For instance, you may have been brought in to do training by someone the people in the group dislike or mistrust and their feelings against that person rub off on you. They may have been ordered to go to the training session when they think that it is a waste of time or they feel too busy to take time out for it. They may have had some bad experiences earlier with what was called "training". No meaningful training is going to take place while these feelings are in the way. Get them out where they can be dealt with.

Encourage people to talk about feelings that may keep them from comitting themselves to learning. Listen carefully, take their feelings seriously, and show that you understand. Get all their "gripes". Then discuss what can be done about them. Point out the ones you and the group can deal with and do something about (maybe you can even build some of them into your training program) and what ones are "outside of this room". If you and the group can work on one or more of the problems during the training session, this may heighten their learning interest.

Usually, listening carefully and taking the problems seriously is enough. Often, feelings have built up because people felt there was no one they could talk to about them. When people get things off their chest, they will be ready to move on with you.

B. Contract-Building

Make clear to the group what you are prepared to offer—time, skills, things which you think will help them. Find out from them what they expect from you and what they are prepared to commit to the training. This is not a formal procedure; it is a further way of clearing the air and getting the participants pulling together with you.

C. Climate in the Group

A climate or atmosphere has to be established so that people feel free to get into the *E*xperience, *I*dentify, *A*nalyze and *G*eneralize process. If people will be judged "wrong" or "stupid" by the group, they won't really participate in what's going on. Learning happens more easily in a climate that is:

1. *Non-judging*—People and their actions are not judged as "good" or "bad." The group looks at what happens and tries to see why it happened or what made it happen.

2. *Experimental*—People feel free to try out new ideas and new ways of behaving.

3. *Respectful of people's feelings as well as their ideas*—People do not fear having their feelings ignored or criticized, and they can honestly express themselves *as they are*, rather than as they think others expect them to be.

4. *Accepting people where they are*—People are not made to feel they have to act or not act in a certain way to be included and accepted by the group.

5. *Aiming at a purpose*–Everyone in the group knows the training purpose and keeps it in mind. No one rigidly keeps the group on "the subject".

D. The Role of the Trainer

Each person must find his own "style", his own way of behaving with a group. Some guidelines:

1. Create the climate described above. Behave in ways that demonstrate this climate for the group. Support people who try things out. Uphold those standards when members of the group don't follow them. If someone becomes critical or ignores the feelings of other people, describe what you see happening. Explain your concern about its effect on the group's learning climate. Do not criticize people who criticize; otherwise your behavior contradicts what you are saying.

2. If the group flounders or begins to lose sight of the overall purpose of the session, introduce techniques, non-verbal exercises, etc. to help get things going.

3. Give your own opinions and feelings. Be a person. Let people realize that you feel part of the group and that you care about their problems.

4. Flow with the group. Let group members have as many chances as they can to experience success in *I*dentifying, *A*nalyzing and *G*eneralizing. These experiences improve their skills. The more *E*xperiencing, *I*dentifying, *A*nalyzing and *G*eneralizing they do in the group, the more they will carry this way of looking at their performance and improving it back to their jobs.

5. See yourself as a resource person, a helper rather than the leader or key person in the group. The people have to go back to their jobs and function without you. If you become too important they won't be able to take what they have learned and apply it on their own. So don't:

   —over direct the group

   —speak before other group members can collect their thoughts

   —comment excessively

6. Respond to situations as they arise. Your feelings are your best guide. Trust your own ideas and do what seems right to you at the time. Later, go back over the things that happened; figure out why they happened and what else you could have done. You are a learner too.

E. Observing During the Session

1. Watch what is going on and try to understand it—even while you are participating. In your mind, step back frequently and try to form an overall picture of the session as it progresses, including your behavior and feelings. Discuss your reactions with the other trainers during a break. You may spot something (or someone) blocking people from learning. See what progress people are making and what changes in behavior are happening. Keep an eye on the climate for learning, checking to see how well it follows the guidelines described above.

2. Some things to watch for are:

a. who talks and who doesn't at different times
b. how much people really listen to each other and the trainer
c. how people sit, what their faces say, what they do with their hands, etc.
d. what subjects come up again and again
e. what interrelationships show up, what groups form, who interrupts whom, who follows whom
f. how the group as a whole makes decisions and solves problems
g. what patterns seem to develop

3. Concentrate on *what* happens and *how* it happens, rather than on *judging* what is happening.

F. Working with the Other Trainers

The trainers have discussed the training plan and any problems between themselves before the session. If any conflicts develop, wait until the break when the trainers are scheduled to get together. Discuss differences there.

If you must deal with differences between trainers in front of the group, be honest and open. A group can learn from watching trainers work out differences if the trainers do it in a problem-solving way.

In regularly scheduled meetings of trainers at meal times, coffee breaks, etc., use the *E*xperiencing, *I*dentifying, *A*nalyzing, and *G*eneralizing approach to look at what has happened. Look for what moved the group along and what blocked progress. Leave time to *G*eneralize. Decide what to do, if anything, about the things you have noticed.

Include in the *E*xperiencing, *I*dentifying, *A*nalyzing, and *G*eneralizing what the trainers did and how they did it. Encourage the trainers to be open and to level with each other.

G. Using a Consultant

If you decide to use a consultant, plan for:

1. **The consultant's entry process**

a. The easiest entry for a consultant happens when the people themselves invite the consultant.

b. In any case, before he comes, plan with them how they can make use of him, what questions they would like to ask; particular problems they might role play for him. Use these ideas in planning the consultant's session with him. The group is more likely to be open to him if they are involved in planning for his time with them.

c. Suggest to the consultant that he use the two-way interviewing described in The Entry Process, page V-1. Don't push it if he is not comfortable with the idea. Work out with him some form of entry which will accomplish the purpose you and he both have for his attending the session.

2. <u>What the consultant does in the group</u>

If the consultant appears, gives a lecture, answers a few questions and leaves, the people will probably listen politely, but, as we discussed earlier, not learn very much that they will actually use later on. To avoid this, try to have the consultant's visit be as much of an *E*xperiencing, *I*dentifying, *A*nalyzing, *G*eneralizing experience for the group as you can.

You may want to start by explaining to the consultant your objectives and training plan and then asking him how he thinks he could best work with the group. Work out with him a general plan for his session with the group. Make sure that he understands that the more he involves the people when he shares his knowledge with them, the more they are likely to learn.

VI. EVALUATE THE TRAINING

The purpose of evaluation is to help you learn:

1. how well you achieved your training goals
2. what you can *G*eneralize from this training *E*xperience to use in other training programs.

The major sources of information on which to base your evaluation are listed below along with suggested ways of *gathering* and *using* the information from each source.

A. Evaluation by Participants

1. Questionnaires can be used to gather *opinions* and *attitudes* from the people in the program both during and after the training.

EXAMPLE 15

Participant Evaluation of One Training Session and the Trainer

Title of Session　　　　　　　　　　　　Date

Name of Trainer

All questions on this form deal with the trainer and the session.
Your answers will help us build better training programs in the future.
If you would like to make additional comments, please do so in the space provided.

Please answer all questions on this form.

1) Was the subject related to your needs and interests?　No____ Some____ Very Much____

Comment ____________________

2) How do you feel about the amount of lecture and the amount of discussion in this session?
Too much lecture____ O.K.____ Too much discussion____

Comment ____________________

3) How do you feel about the trainer for this session?

	Excellent	Very Good	Good	Fair	Poor
A. How well did he state objectives					
B. How well did he keep the session alive and interesting					
C. How well did he use blackboard charts and other aids					
D. How well did he maintain a friendly-helpful manner					
E. How well did he illustrate and clarify the points					
F. How was his summary at the close of the session					

Comment ____________________

4) Here is a scale describing the way you might feel about the Trainer. Please circle the number that is closest to the way you feel about the *Trainer.*

BAD 1 2 3 4 5 6 7 GOOD

5) Now please circle the number that is closest to the way you feel about the *Session.*

BAD 1 2 3 4 5 6 7 GOOD

6) Will you do anything differently on your job as a result of this session?
Yes____ No____ If yes, what?____

7) What would have made the session more effective?

EXAMPLE 16

Participant Evaluation of a Completed Training Program

These questions represent our request that you assist us in evaluating the training program and its components. Your frank responses will help us improve the design of future programs. All the information received will remain confidential. There is no need to sign your name.

As a result of this program, what things will you do differently in your work?

What do you consider to be the most important thing you have learned in this program?

The training materials distributed were: ________ excellent ________ satisfactory ________ poor ________
comment ________

A certain amount of factual information was given to you in this program, do you think:

____ a there should have been more factual information
____ b there should have been less factual information
____ c the amount of factual information in the program was adequate

comment ________

The total training program was:
________ too long ________ too short ________ just right
comment

The individual training sessions were:
________ too long ________ too short ________ just right
comment

The classroom facilities were:
________ excellent ________ satisfactory ________ poor

I would recommend this training program to other groups.
________ Yes ________ No
comment

I would like to return for another program which started where this one stopped.
________ Yes ________ No
comment

I liked the training program in general.
________ Yes ________ No

I would rate the training program
Bad 1 2 3 4 5 6 7 Good

What were the worst features of this training program?

Please list below any subjects not included in the program which you feel should have been covered and which you would like to have included in a follow-up program.

2. Measurements of *knowledge* (fact tests) can be made by testing before and after a session designed to help trainees learn certain facts.

3. Measurements of *writing skills*. Short written exercises can be assigned after a session designed to teach a skill such as writing weekly reports or preparing proposals.

4. Measurements of *behavior change* are generally a better indicator of your training effectiveness than measurements of knowledge —for example, persons behavior during an interviewing role play (see Observing During the Session on page V-3) is more likely to indicate effectiveness of training than a written test about interviewing. Measurements of behavior change are not as precise as other forms of evaluation. They *do* provide valuable information and should be included wherever possible.

5. Questionnaires and interviews can be used after participants are back on the job. See section C. below.

B. Evaluation by Trainers

After the program, get all the trainers together for a final *E*xperiencing, *I*dentifying, *A*nalyzing, *G*eneralizing session. Use all the information you have—the trainers' observations and reactions to the session, the trainees' reactions and recommendations, comments of observers and consultants, any tape recordings of the session and opinions of the trainees' supervisors and the agency (if these are available). Focus on:

1. **What happened during the session**
   a. Look for the same things about the total program that you looked for during the sessions (see Observing During the Session, page V-3 and working with the Other Trainers, page V-4).
   b. Look for any overall patterns of behavior (by trainers, trainees or both) which moved things along or slowed them down.
   c. Note down the things that went well, for future use.
   d. Look at the problems that came up. Figure ways to avoid them in the future.
   e. Leave some time for brainstorming about new ideas.

2. **How the session compared with your original plan**

   a. Do training goals still seem clear and realistic? Were they appropriate? Did you achieve them? What was especially helpful in achieving them and what hindered achievement?
   b. Did the plan work out the way you expected it to? Where did the session not follow the plan? Why? Was this helpful for reaching your goals?
   c. Was there enough time for *E*xperiencing, *I*dentifying, *A*nalyzing, *G*eneralizing—especially the last three steps (IAG). Did people participate? Why or why not?
   d. How would you change the plan if you had it to do over again? Be specific. What would you include or leave out? What new things would you try?

C. On-the-Job Evaluation

The primary aim of your training program is improving people's performance in their work.

1. Ask for reports by trainees of critical incidents in which they believe the program changed their behavior. This approach to evaluations reinforces the learning. It encourages trainees to continue the *I*dentifying, *A*nalyzing, *G*eneralizing process beyond the program and apply it to their on-the-job experiences.

2. Conduct a follow-up group interview of trainees. Discuss experiences they have had since the training program.

3. Ask for reports by supervisors and other co-workers on whether or not the trainee has in fact improved. The more precisely you define the change you expect, the more exactly you can structure your training session and relate it to questions you will ask co-workers.

For more detailed information on evaluation, including data on collection methods and a consideration of the special problems involved in evaluating training, see *Learning to Work in Groups* by Matthew B. Miles. Teachers College Press, Columbia University, New York, N.Y. 1959 paperback $2.25

D. For the Record

Write a report of your evaluation for your training sponsor or for your own file. Include:

1. A short description of your training goals and plan
2. Information on the participants: number, job categories, agency for whom they work
3. Place, dates and number of hours of training
4. Methods of evaluation
5. Results of evaluation
6. Evaluation of consultants and special materials used
7. Conclusions
8. Recommendations for future training

VII. APPENDIX

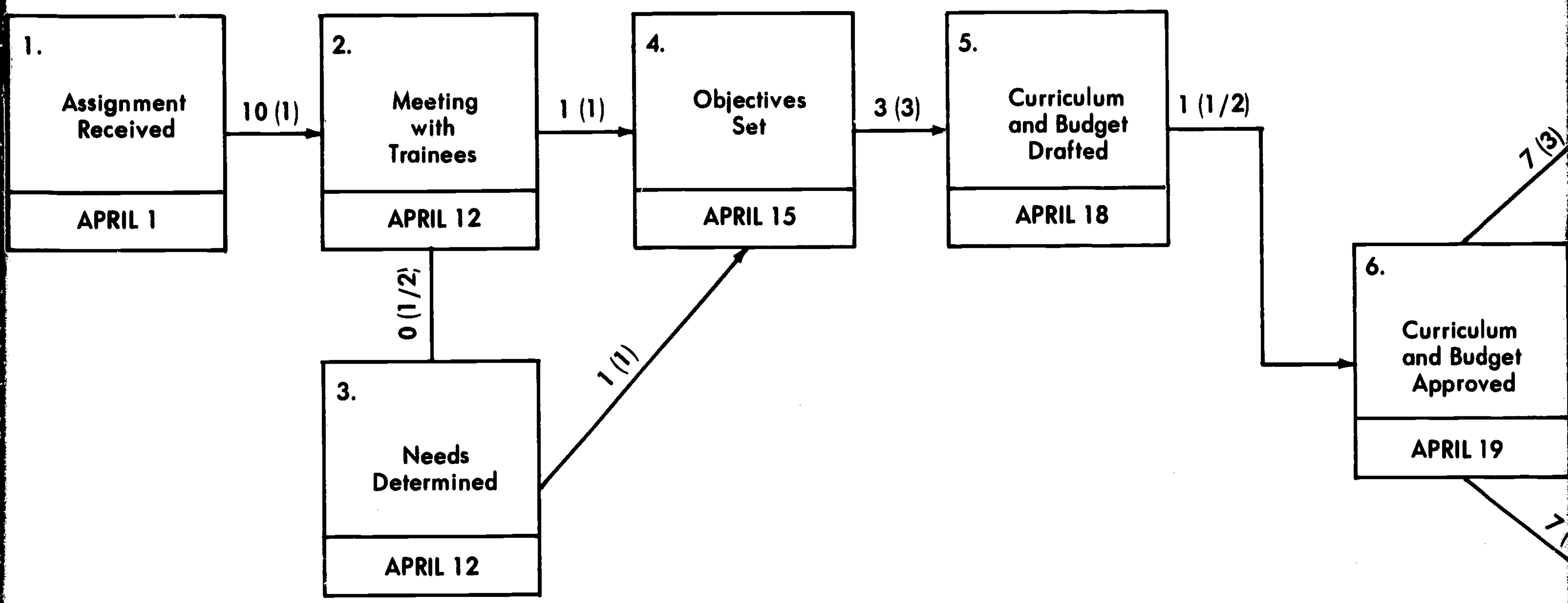
P.E.R.T. stands for Program Evaluation and Review Technique. Some people find that using a P.E.R.T. chart helps them plan and use their time effectively.

To Use a P. E. R. T. Chart

1. Make a box for each important step of your training.
2. If steps follow one after the other the boxes should be in a horizontal line. (The training plan is written after the training needs are determined; the plan is approved after it is written and so on).
3. If steps will be happening at the same time the boxes should be in a vertical line. (Hiring consultants, choosing a site for training and developing training materials can all take place during the same period of time. They do not have to follow each other.)
4. In the narrow space at the bottom of each box write the date when you plan to finish that step.
5. On each arrow between 2 boxes put:
   a. (outside the parentheses and to the left of them.) the number of working days between the date in the box to the left and the date in the box to the right.
   b. (inside the parentheses.) the number of working days you plan to spend on the step in the box to the right.

A sample P.E.R.T. chart is shown below.

SAMPLE P.E.R.T. CHART



APRIL

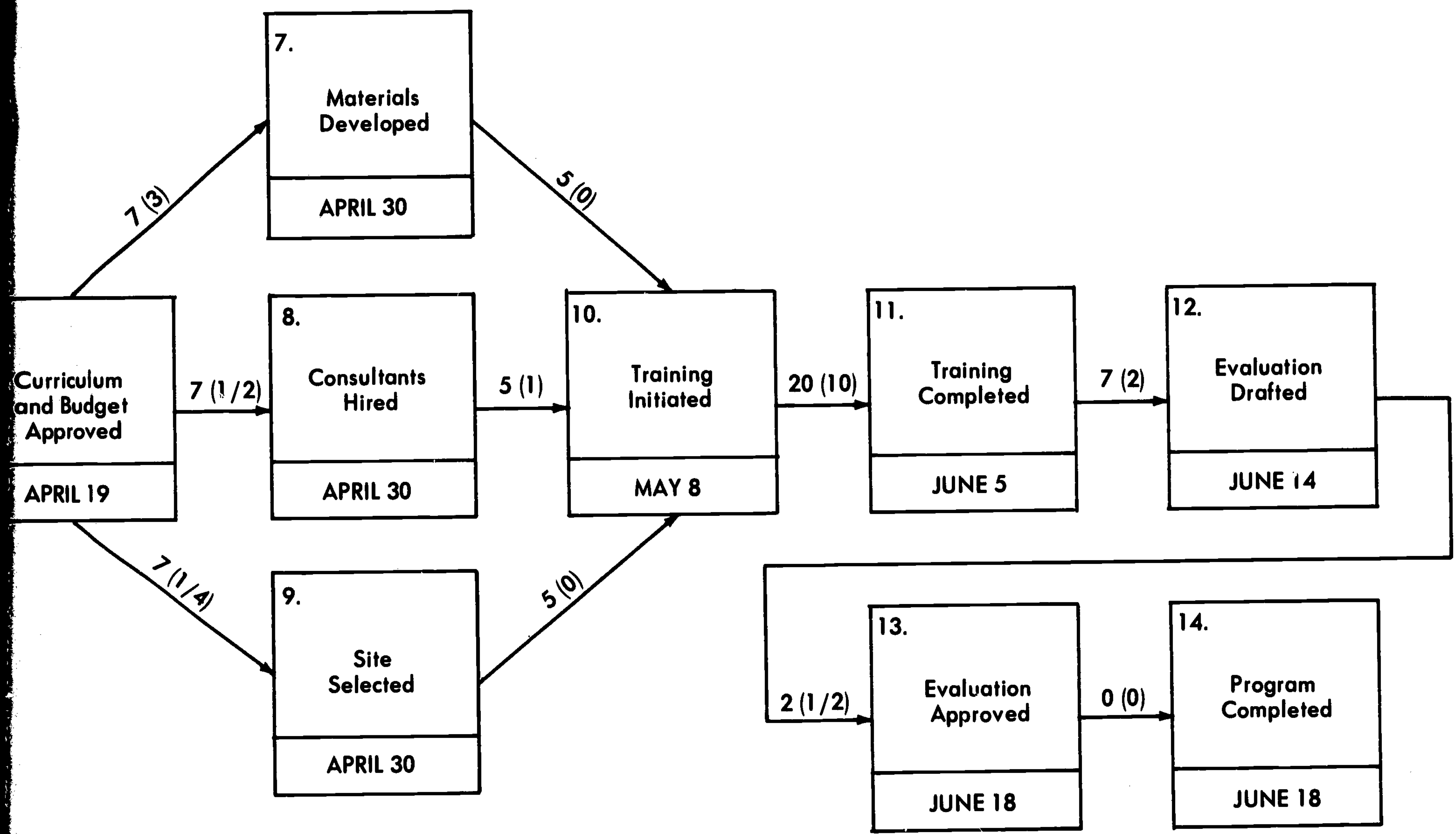
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

MAY

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

JUNE

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						


7.
Materials Developed
APRIL 30
7 (3)
5 (0)
Curriculum and Budget Approved
APRIL 19
7 (1/2)
8.
Consultants Hired
APRIL 30
5 (1)
10.
Training Initiated
MAY 8
20 (10)
11.
Training Completed
JUNE 5
7 (2)
12.
Evaluation Drafted
JUNE 14
7 (1/4)
9.
Site Selected
APRIL 30
5 (0)
2 (1/2)
13.
Evaluation Approved
JUNE 18
0 (0)
14.
Program Completed
JUNE 18

For a catalogue of other training materials
write to:
New Jersey Community Action Training Institute
P.O. Box 4078
Trenton, N.J. 08610