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ABSTRACT

The manual is designed to help student volunteer leaders and others plan and conduct training activities for student volunteers. It exposes student volunteers to skills, knowledge, and attitudes necessary to perform competently. Section 1 covers the assessment of training needs and the establishment of training objectives while section 2 shows how to complete a design based on those needs and objectives. Section 3 focuses on training techniques and covers climate setting, goal agreement, and conducting sessions. Sample techniques to actively involve the learner in the learning process are included; exercises are for the initial phases of training and are to stimulate trainers to invent learning exercises appropriate to a particular situation. The appendix includes sections that discuss the experiential, participatory theories of adult education as well as a bibliography of design and methodology. (EA)

Training Student Volunteers

ACTION
NATIONAL STUDENT VOLUNTEER PROGRAM
806 Connecticut Avenue, N.W.
Washington, D.C. 20525

ACTION
WASHINGTON, D.C. 20525

This manual was designed to help student volunteer leaders and others plan and conduct training activities for student volunteers. We hope that it will meet some of the most pressing needs for assistance in this area, and introduce many people to ideas, techniques and approaches they can pursue on their own.

Please let us know what you think of the manual.

National Student Volunteer Program

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INTRODUCTION

HOW TO USE THIS MANUAL

Our first assumption is that you don't consider yourself an expert trainer. If you do, then you already know just about everything in this manual. Our second assumption is that you want to become more skilled in training student volunteers.

You may be called upon to conduct learning events for groups of three to 100 or plan a small workshop in a certain, specified area. Your training sessions may last a few hours or several weeks. Perhaps you will do a great deal of training, or perhaps you train only occasionally. Either way, this manual is designed to help you put together systematic training events regardless of numbers, time, or experience. Even though these factors make a great deal of difference in how a trainer conducts himself, the principles of design are the same for all sorts and conditions of training.

This manual offers you a design scheme. It is a seven-step process:*

1. Assess Needs
2. Establish General Learning Objectives
3. Establish Definitive Learning Objectives
4. Set a Climate for Learning
5. Agree on Goals for Learning
6. Conduct Learning Events
7. Evaluate Accomplishments

By the time you finish the manual you should be able to use the seven-step process with a reasonable degree of skill. For those of you who have never trained before, you will be able to design a simple two-to-eight-hour session. For those with prior experience, there is virtually no limit. This manual does not, and cannot, offer training in delivery skills. A book cannot do that. Delivery skills are learned by experience.

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* This seven-step process and its use as developed through this manual is based upon the ADOPT(R) process designed by Fredric H. Margolis.

This design scheme is most appropriate for training of groups convened to provide student volunteers with the skills, knowledge, and attitudes necessary to perform competently. Your training will have clear objectives and will move towards a defined goal. This manual does not deal with encounter or sensitivity training. Sensitivity training is a unique art which only very well trained people are qualified to undertake. Appendix I, "What is Training," provides a fuller treatment of this subject.

There are several sections in the manual. Sections I and II are interdependent and must be read together. Any of the others may be read independently, but together they make up a rational whole. You may want to read from beginning to end, but this is a manual, not a novel. You may experience a sense of bogging down if you choose to read straight through. Don't worry about that. You can always come back later.

The first section is on design and contains two important parts: "Assessing Training Needs" and "Establishing Objectives for Training." Without the information in this section, the others that follow will be confusing if not downright incomprehensible. The second section is also a design section. It shows one how to complete a design once the needs have been established and objectives set. The third section is focused on the training event itself and covers climate setting, goal agreement, and conducting the session. A number of sample techniques are included. They are designed to actively involve the learner in the learning process. They are generic exercises that are useful for the initial phases of almost any training event. Thereafter, you're on your own. Most of you will want to invent your own learning exercises to fit your needs.

There is an annotated bibliography after each section and a complete bibliography in the Appendix. The Appendix also includes a section on training and another on trainers. These sections discuss the theory of adult education. They reflect an intentional bias with respect to the learning characteristics of adults. We make no apology for the bias because we believe in experiential, participatory education. This whole manual is built upon it, but there are, of course, other ways to learn.

Here and there you'll discover self-testing devices and learning aides. They are included to assist you. We recommend their use, but they are not essential.

The loose leaf design permits you to add or delete material as you wish.

You may reproduce anything in this book. If you have occasion to use the narrative portions, we ask that you give credit to

NSVP. The exercises in the Techniques Section are not original with us; we have adapted some of them from the J. William Pfeiffer and John E. Jones series, A Handbook of Structured Experiences for Human Relations Training, University Associates Press, P. O. Box 615, Iowa City, Iowa 52240.

We hope you enjoy this manual and find it useful. Happy training!

SECTION I

DESIGN:

NEED ASSESSMENT AND ESTABLISHING OBJECTIVES

SECTION I

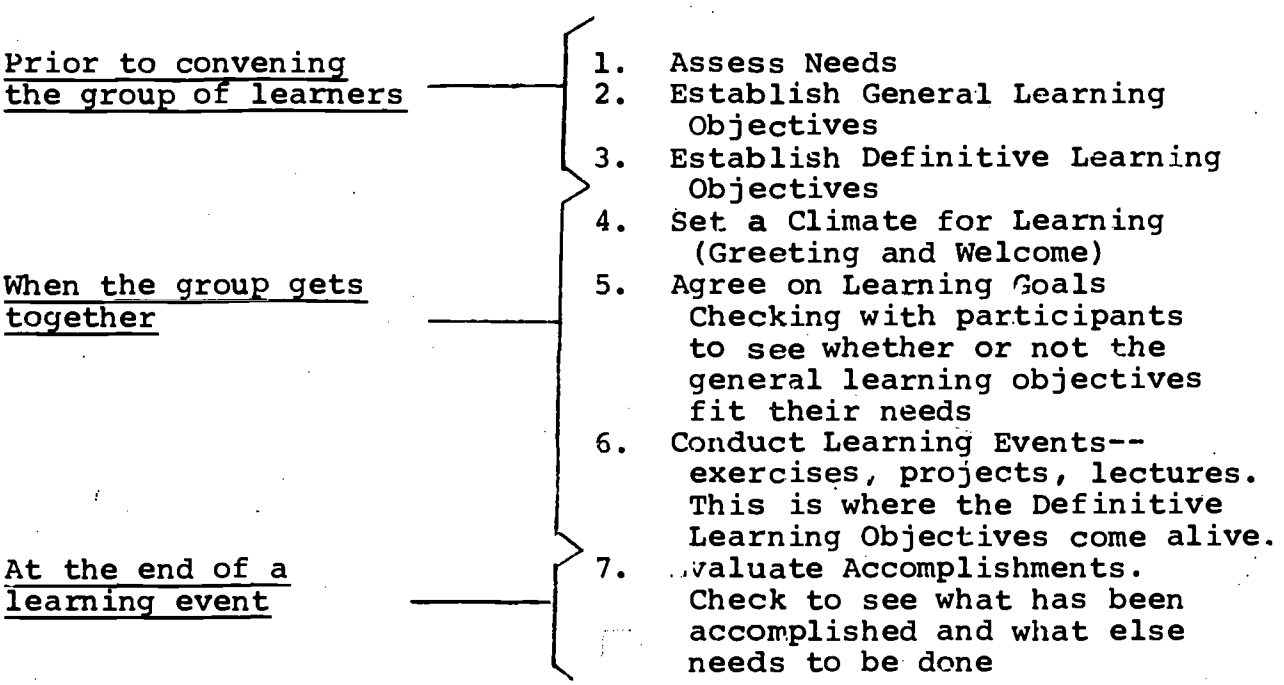
DESIGN: NEED ASSESSMENT & ESTABLISHING OBJECTIVES

This section will help you learn how to design training programs. Like most beginning trainers you're probably more anxious about techniques and methods than you are about design. Ok. Go to the Techniques Section first, and look at it if you like. But come back. Techniques are great if you have a goal but not much help without one.

Designing is putting it all together. We'd like to share a seven-step design process with you:

1. Assess Needs
2. Establish General Learning Objectives
3. Establish Definitive Learning Objectives
4. Set a Climate for Learning
5. Agree on Goals for Learning
6. Conduct Learning Events
7. Evaluate Accomplishments

Of the seven steps, the first three are done before the training event actually begins. Steps 4 and 5 are the very first steps taken when you meet your group. Step 6 is the biggest, and step 7 caps it off.



READY?

We'll begin with assessing needs and setting objectives, but before we do, let's try to put design in some sort of context. A design is really a recipe--a recipe for the sort of stew you're going to concoct. It should have a pinch of this and a dash of that. But, of course, you must have the basics, and that is what you will find in this manual. Then you can make it as spicy and as complex as you want or need to.

The seven steps are a checklist. The steps are, of course, linear. This manual begins with step 1 and goes right straight through. However, a linear progression is not necessary, and most people don't create designs in a linear way. Some start by thinking of methods; others start with objectives. No matter where you begin, all the basic ingredients have to be included sometime before the recipe is complete.

Some designs are informal and simple. For example, for an hour training session, do you need twenty pages of plans? Scarcely. But you do need to know what you want to happen even if the design is all in your head.

NEEDS ASSESSMENT

What do you need? If you ask for something you need in a drug or hardware store, this question makes sense and gets results. Most of us find it pretty simple to describe our material needs. But suppose a doctor, a lawyer, or a psychiatrist asked you what you need? You'd find it difficult to answer. How do we know what we need? That's what we hire professionals for. We depend on them for diagnostic assistance. This applies to trainers as well. Professionals are not clairvoyant. They need a great deal of information from their clients. How the professional asks for the information is the key. For example, it usually isn't productive for a trainer to come right out and ask the volunteer what his training needs are. Often, the answer is that the needs are beyond counting--which is a dramatic reply but not a very useful one. So we suggest that when you begin a needs diagnosis prior to training, begin with problems. Problems are easier for people to talk about and usually a lot clearer than needs. Moreover, if you can talk about problems rather than training needs, you get a glimpse of the situation at the level that permits you to make a professional judgment as to whether or not training is needed. For example, if the volunteer tells you he needs a series of sensitivity training sessions, he has offered you a training solution. But, to know whether that solution is sound, you must know more about his problems.

A training need is the description of the kind of training or re-education required if volunteers are to solve problems they can't presently solve with the skills they have. So, what you do first is ask: "What sort of problems will volunteers meet that they'll be expected to solve?" With that information you'll be able to say, "The training they need to solve that problem is the skill to do A, B, & C and knowledge about D, E, & F."

Need assessment is not difficult. There are, however, some guidelines and thoughts to keep in mind--and practice helps a lot.

The name of the game is first to identify problems and then translate them into learning needs--if learning will solve the problem. Sometimes it won't. Often some other intervention is called for, perhaps an administrative change, an infusion of cash, or additional staff. For example, if one of your projects is a hot line, you wouldn't suggest training if the real problem is a lack of phones. Training won't solve everything, particularly lack of money, insufficient space, or poor public relations.

Look at the problem and then ask yourself whether training will help solve it. Suppose the problem is to establish a tutoring program for Indian children. Will training help? Partly. First you must get some volunteers. After that, you'll need to provide training in (1) tutoring and, (2) cross cultural communications. Notice that part of the problem is recruiting and part of it is logistical. Training alone won't do the job. The training component is only a part of the whole.

So far, so good. You've looked at a problem and identified at least one training component. How do you then translate a problem into a training need? Look at the last example again.

Problem: You have some volunteers but they don't know how to tutor Indian children.

Training need: _____

You're right; volunteers need to learn how to tutor. You've identified a skill volunteers will need to learn and in so doing have described a training need. Try another.

Problem: Your volunteers have never worked with Indian people and know nothing of their culture.

Training need: _____

If you said volunteers need to learn to appreciate the history and value of the Indian culture, you're right. And that is how

you translate a problem into a training need: Identify knowledge, skills, and attitudes that people need and can learn and use to solve known problems.

For the most part, you will train volunteers for projects you know well. The training needs are obvious and require little data gathering and analysis. If you are recruiting and training volunteers to work on a hot line, trainees will need information about drugs, sources of referral, and a smattering of consultation and counseling skills. Most projects also require orientation. Work in correctional institutions, with the handicapped, or in hospitals represent a culture displacement for volunteers, and most will need a chance to get accustomed to their new environment. As you can see, it isn't difficult to discover or infer training needs. Besides, you're much more familiar with your own organization than anyone else and probably already have a good sense of what's required.

But suppose you don't know. Who do you ask? How do you get the information?

Go first of all to the people with whom the volunteers will work and ask what volunteers will be expected to do; how they will be expected to act. Check with the volunteers themselves when the time comes. Ask others who have been involved in the same program. Ask service recipients how a competent volunteer should act. Get help from people on campus who do training. Get as many people involved in need assessment as you can. One caution, however. Don't go on forever assessing needs just as if you had to know everything before going on to the next step. That isn't necessary. Begin training as soon as you can and begin with the most immediate need.

Learning Domains

One of the biggest factors in needs assessment is the ability to tell what learning domain a problem falls within. A learning domain is simply a handy category. There are three that are generally used and cover most contingencies.

They are:

- *Cognitive Domain*
- *Skill or Motoric Domain*
- *Affective Domain*

The cognitive domain covers the intellectual sphere. It includes analysis, synthesis, knowledge acquisition, memory,

facts, rationales, and systematic philosophy. Training designed to increase knowledge or intellectual acuity is in the cognitive domain.

The skill or motoric domain relates to operations people perform to accomplish tasks. Counseling is a skill. A complicated one, but nevertheless a skill. Tutoring in reading is a skill. Managing a re-cycling center is a skill. All require brains and a cognitive base, but the dominant component of the operation is in the skill domain.

The affective domain includes values, feelings, and attitudes. Racial encounter groups designed to change attitudes and feelings are examples of affective training. Sessions in which volunteers share their feelings and reflect upon them for depth of insight are affective in nature.

We'll use these terms again when discussing objective setting. For the present, try to think of problems in terms of learning domains. The reason for doing so is that training needs must conform to the domains of the problem. If the problem revolves around poor attitudes, don't develop a training program that provides information about attitudes. Develop one in which people have a chance to actually express their attitudes and assess the consequences of having attitudes such as a racial bias. Or, if you want people to learn a skill, provide a training program that gives participants a chance to practice the skill. The point is to avoid setting up a lecture series to change attitudes, sensitivity groups to teach tutoring skills, or practice sessions to offer knowledge. Try putting the following into their proper learning domain.

1. History of a culture is in the _____ domain

2. Typing is in the _____ domain

3. Empathy with a minority is in the _____ domain

4. Interviewing is in the _____ domain

5. Frustrations generated because plans are not working well is in the _____ domain

Answers:

1. Cognitive. This is information; head work.

2. Skill. Typing is essentially a motor skill; body and hand work.

3. Affective. Empathy is an emotional response; a feeling.

4. Skill. This is a little harder because interviewing is also partly cognitive. But, the dominant domain is skill; doing something with the body (and the mouth in this example).

5. Affective. Feelings are not rational. They're simply there and need to be taken into consideration.

How are you doing? We'll treat this again later, so don't worry too much about it if you're having trouble. Remember, the domains are simply handy categories.

Right now, think of need assessment as a necessary but relatively simple task. Before we leave the subject, let's see what you can do to make an assessment more accurate.

What You Can Do To Increase the Accuracy of Needs Assessment For Training

- Define the problem: Is it that people need tutoring skills or need a bus to transport tutors? Or both?
- List new skills, knowledge, and feelings that would solve the problem: tutoring skills, knowledge of the role volunteers are expected to perform, high degree of empathy with people, etc.
- Identify behavior for which people can be trained: teach children, listen, interview, initiate contacts with strangers, give information over the phone, and manage a budget.
- Categorize behaviors by learning domain.
- List training you know how to do.
- List training you aren't qualified to handle.
- Get others involved in the assessment, particularly volunteers themselves.
- Recognize the limitations of training. It can't solve every problem.

What You Can Do To Botch a Needs Assessment for Training:

- Not make one.
- Look at the world solely in terms of the kind of training you're personally capable of doing.
- Make the assumption that training can solve the problem.
- Not have a clear idea of what you can do.
- Not define the problem.
- Not involve others.

Some Signs that Will Tell You the Need Assessment was Incomplete

- You haven't the foggiest notion where to begin.
- Participants keep asking, "What are we doing this for?"
- You can't write any objectives . . . or even think of any.
- The learning domains aren't clear to you and others.
- You spend a long time looking at your shoes when someone else asks you what needs your training program will fulfill.

The following examples may be used to test your ability to ferret out training needs. Use them if you like.

PROBLEM	
Indian children need tutors	
NEED	The domain is:
Volunteer tutors to work on the project	Cognitive o Skill o Affective o
Is this a Training Need? [ ] Yes [ ] No	Not applic. o
NEED	The domain is:
Transportation for tutors	Cognitive o Skill o Affective o
Is this a Training Need? [ ] Yes [ ] No	Not applic. o
NEED	The domain is:
Acquaint tutors with Indian culture	Cognitive o Skill o Affective o
Is this a Training Need? [ ] Yes [ ]No	Not applic. o

Answers on next page.

Volunteer tutors--No; No applicable learning domain.

Transport tutors--No; No applicable learning domain.

Acquaint tutors--Yes; Cognitive learning domain predominately and affective domain secondarily. Refer to page 5 if you had trouble with this one.

Needs Assessment Test

"Chico's Person-to-Person Bridge," is an article taken from *Synergist*, the NSVP quarterly journal. Read the article and do the exercises following it if you'd like to test your ability to do a needs assessment.

Donations of furniture from the community arrive through the back door of The Bridge as, below, a student enters seeking help.

Chico's Person-to-Person Bridge

"A STRUCTURE spanning and providing passage over an obstacle"—that, according to a well-known dictionary, is the definition of a bridge.

While The Bridge in Chico, Calif., may not be exactly what the dictionary's editors had in mind, their definition does a good job of describing the community's 18-month old-crisis and drop-in center.

The "structure" of Chico's Bridge is a network of involved individuals, and the obstacles overcome daily range from dispelling the loneliness of a drop-in visitor with a cup of coffee and a little conversation to handling a phone call that begins with the statement: "I want to kill myself."

In terms of volume, its telephone logs show that The Bridge receives an average of 700 help-seeking phone calls per month and during the same period of time usually serves about 300 drop-in visitors.

ımatic example of successful college-community co-n, The Bridge is a merger of the Chico Drug Alert Council and a campus drop-in center for those with personal problems, both established late in 1969. The drop-in center was founded by some students at Chico State College who were members of CAVE (Community Action Volunteers in Education). The Drug Alert Council was set up by a group of concerned citizens.

Actually, the two CAVE volunteers who spearheaded the project were inspired to establish the drop-in center after completing a social psychology class assignment that involved the creation of a center.

Putting theory to the test, the student volunteers developed a proposal which included detailed operational plans. On the basis of this proposal, CAVE obtained college administrative support for the project and was able to open the original drop-in center in a college-owned building which the center shared with the United Christian Campus Ministry and a group of students operating on open switchboard to handle crisis calls of all sorts.

As things developed during the summer months, these latter students were unable to maintain adequate staff. Subsequently their "hot line" was incorporated into the drop-in center because CAVE volunteers felt the phone operation served a valuable purpose and should not be abandoned.

Since merging with the Drug Alert Council, The Bridge has moved from campus to community literally as well as figuratively. Its second home was a building on the edge of the campus. Currently it is located in a house in the midst of a residential section and it is about to move into a mixed residential-commercial area very near the center of town.

According to Director Steve Pomerantz, "The problems which recur most frequently at The Bridge are emotional life crises.

"The increasing complexity of the world makes it difficult for many people to solve the problems of day-to-day living. This situation, coupled with the fact that most people these days are afraid to 'get involved' in others' problems created a very real community need, a need filled by the establishment of The Bridge.

"Yes, in some cases drugs are involved, but most often they are not the main problem. In our experience, a drug problem, is usually symptomatic of other difficulties."

Who needs The Bridge?

Since privacy is essential before an operation such as The Bridge can be accepted by those it seeks to serve, written records, until recently, were kept to a bare minimum. Now contract requirements make more extensive records necessary to assure continued funding. But, even though they now disclose greater detail, Bridge records still protect the identity of individual clients.

"The oldest 'client' we've ever had was a lonely 80-year-old man who wandered in the door because he thought he had found a place where he could play a game of bridge.

"We had no cards on hand, but someone came up with checkers and a board and a game was soon underway. Later we were able to plug him into a local bridge group looking for new members.

"The youngest case, and one of the most poignant, involved an 11-year-old girl who was brought to The Bridge suffering the aftereffects of a heavy overdose of wine. The confused story we managed to put together seemed to indicate she was the victim of a 'prank' perpetrated by some teenage boys.

"Bridge volunteers stayed with the child until the worst effects of the wine 'wore off' and then took her home to be cared for by her family.

"Later, several counseling sessions were arranged for the girl and her parents, because it developed that the wine incident was related to a family problem."

In very general terms, The Bridge offers three types of services:

1. It functions as a community "drop-in" center where anyone who comes in is assured of a friendly "hello" and a hot cup of coffee. For a few visitors that welcome is enough to improve their outlook on life.

Most, however, have a problem. The Bridge rarely has an instant solution, but someone listens and then helps the troubled individual help himself by setting up counseling appointments or referring him to the appropriate community agency. This service seems simple and obvious enough, but previously it was not available in Chico.

(Continued on next page)

Discussion is as informal as the contributed furniture, but a qualified resource person directs this rap session at The Bridge.

2. The Bridge is a crisis center, and while a crisis does walk in the door from time to time, most such problems are announced by a ringing telephone.

This area of operations was greatly expanded recently when The Bridge entered into a contract with the Butte County Health Department to operate a county-wide, toll-free "hot line." At this writing, callers from outside the immediate Chico area are being counseled by phone and, when appropriate, are referred to community agencies near them. However, in the near future, The Bridge hopes to train volunteers living throughout the county so that the organization can provide a network of qualified people available to respond personally in crisis situations.

3. Finally, to help people explore their different approaches to life as well as methods of coping with various problems, The Bridge conducts encounter groups and sensitivity training sessions. Trained leaders guide workshops that last anywhere from three hours to three days.

While the paid staff is available on a regular schedule for counseling and for other appointments during "open" hours, there are always at least two volunteers on duty at The Bridge and a third is "on call" at home to help with emergency situations.

Open 15 hours a day (9 a.m. to midnight), seven days a week, The Bridge hopes to inaugurate around-the-clock service as soon as its volunteer corps is large enough to provide the necessary manpower on a continuing basis. (The Bridge has 40 active volunteers, is training a class of 20 new volunteers, and would like to have a total of 80 actives on its volunteer roster).

Recruiting Volunteers

Despite its official separation from CAVE, 75 percent of The Bridge's volunteers are still Chico State students. "We need to involve more community people in this aspect of operations," said Pomerantz, "so we will not take such a manpower licking during school vacations."

But despite its urgent need for additional volunteer staff, The Bridge handles recruitment very selectively.

"Unhappily, when we put out a general call for volunteers, we seem to attract large numbers of persons who really are not qualified... in fact, an interview often reveals that they themselves are in need of counseling and/or other aid from The Bridge," explained Pomerantz.

"Therefore, in our current recruitment campaign, we are experimenting with a new technique. We are approaching community leaders–doctors, lawyers and others who have many contacts in the Chico area–and we are asking them to give us the names of persons they think might make good volunteers. Then we approach these individuals directly. Though it's too early to say, we hope to acquire some outstanding volunteers via this route."

The paid professional staff at The Bridge includes three graduate students, two working towards their master's degrees in social science and the third about to get his in counseling. The fourth staff member, appely enough, is a recent high school graduate.

Since it is a total community agency, high school students are among those served by The Bridge. Aside from individual teens who call or drop in with problems, The Bridge regularly receives requests from teachers for speakers to talk with their students. Drug use and abuse is just one of the subjects discussed with these groups, and a teen audience is a demanding one, according to Pomerantz. In order to hold attention, subject matter must be pertinent and directly related to the group's immediate interests.

"For example, high school students quickly tire of the standard drug lecture. Their attention is held only when speakers turn to topics dealing with related difficulties such as parental reaction."

Publicizing The Bridge

The Chico community learns of the availability of The Bridge and the services it offers through public service spot announcements broadcast by the local radio station (The Bridge prepares the tapes used for these spots, the station donates the time), through occasional interviews of Bridge personnel on local TV talk shows, and as a result of Bridge speakers appearing before organizations at every opportunity that presents itself.

Now a legally incorporated agency, The Bridge of today is totally independent of CAVE, the student volunteer organization that set up and financially aided the original drop-in center. Well-established rules of procedure govern the basically non-establishment operation. By-laws set forth the purposes, functions and personnel structure of The Bridge. Operation is guided by a board of directors who represent a wide spectrum of the total community – housewives, lawyers, students, doctors, clergymen and businessmen–people involved in all aspects of the day-to-day life of the town of Chico.

The Bridge is financed through its membership in the Butte County United Crusade and by its contracts with the Butte County Department of Health and the Butte County Mental Health Agency.

How does CAVE feel about its independent "former" project, now handling its own clientele?

"We couldn't be more pleased," said Jim Jessee, student director of CAVE this year. "We planned it that way. The community needed its services.

"The Bridge was always conceived as a project that filled a need for the entire community, not just for the campus community. CAVE's intention all along was to get the program firmly established and then to transfer both the authority and responsibility for its operation to the Chico community."

CAVE, in fact, is now organized to handle as many projects as possible in this manner. Whenever a student volunteer project reaches a pre-determined stage in development, CAVE has decided to seek outside funds or, when appropriate, to encourage a segment of the community to assume full responsibility for a program's existence. This conserves CAVE's financial resources for the support of untried but promising new projects.

List the training needs (things volunteers will have to know, do, or feel) that you've identified in the article, "Chico's Person-to-Person Bridge."

List them according to domains.

Cognitive Domain: (knowledge, information, analytical ability)

1. _____
2. _____
3. _____
4. _____
5. _____

Skill Domain: (doing things like calling, counseling, managing, etc.)

1. _____
2. _____
3. _____
4. _____

Affective Domain: (attitudes, values and feelings)

1. _____
2. _____
3. _____
4. _____
5. _____

Compare your list with the one on the next page.

Cognitive

Know administration of The Bridge
History of The Bridge, Chico Drug Alert, Campus Drop in Center
The functions of the Drop in Center
The appropriate community agencies for referral
The functions of the "hot line"
The availability and purpose of encounter groups

Skill

To treat drug overdose cases (first aid)
To use non-directive counseling techniques with the elderly, drug addicts, etc.
To complete forms for referral processes
To engage in public relations functions on behalf of The Bridge

Affective

Attitudes toward the elderly
Feelings about "social losers"
Self confidence in crisis situations
Attitudes toward "freaks" and "straights"
Feelings about different types of loneliness

It's OK if your list differs from this. These are just some of the needs.

This is a simple form that may help you with a needs assessment.

NEED SURVEY FORM

Problem	Needs as seen by the trainer	Needs as seen by the volunteer/ others	Needs common to both lists	Learning Domains

ESTABLISHING OBJECTIVES

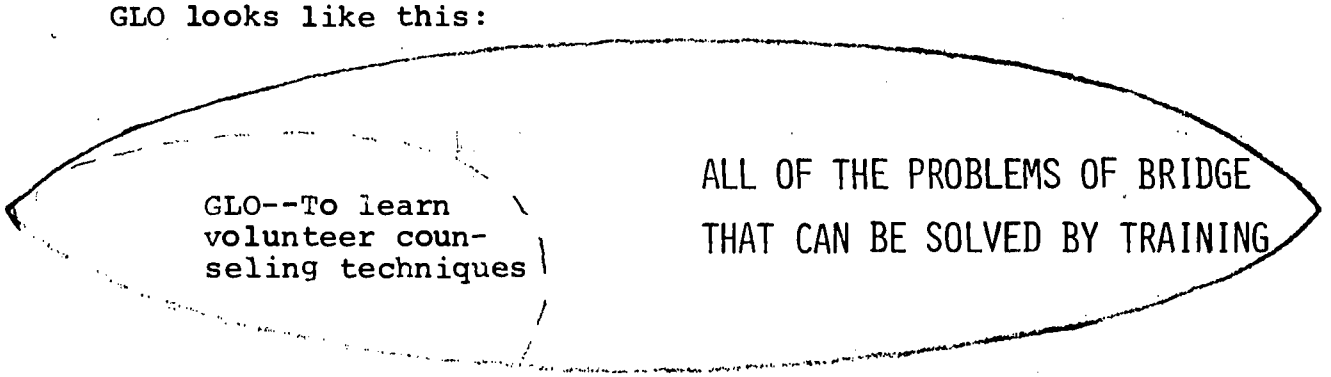
The volunteer's needs and problems are numerous and only some of them, perhaps very few, are open to training solutions. Even those that are training problems can't all be handled at once. So, your first task is to make a selection. Somewhere in that pile of needs there are some you can and should handle. Zero in on those and make a selection you can deal with. Don't worry about those you can't handle.

Make a selection and begin training as soon as you reasonably can. Not only will more problems surface as you go along, but your work will affect the very shape of the problems and the training environment. It happens both ways. Besides, a training session is often the best way to get at training needs. The climate is right for people to share training inadequacies they wouldn't dream of sharing in other, less secure circumstances.

Once your training selection is made, you are ready to decide on what we call a *General Learning Objective (GLO)*. A GLO is a statement of the problem in training terms. For example, suppose the problem is untrained volunteers for the hotline project of The Bridge program. Translated into a General Learning Objective (GLO), the same problem would look like this:

GLO--To learn volunteer counseling techniques

Graphically, the selection of a need and establishment of a GLO looks like this:



You're trying to solve only a part of Bridge's problems--a part training will help with.

This GLO must relate directly to the problem. You have selected a problem that is well within your capabilities and expressed it in a way that clarifies the learning component.

Here is the way it might be expressed:

NEED
To provide volunteers with training in counseling techniques

GENERAL LEARNING OBJECTIVE
To learn volunteer counseling techniques appropriate to the work done at Bridge

USE THIS SPACE TO TRY ONE FOR YOURSELF

NEED

GENERAL LEARNING OBJECTIVE

Now you have a General Learning Objective (GLO); but it is general--vague. The next step is to clarify and define this area you have decided to concentrate on.

Definitive Learning Objectives

You do need *Definitive Learning Objectives (DLO's)* and until you get them, you can't design a training program that's very specific. A Defintive Learning Objective is the final and most essential step in the process of setting objectives for training. The DLO is a specific, concrete, identifiable training objective directly related to the General Learning Objective. A DLO is to the General Learning Objective what individual plays are to a football game. They are complete; each is a distinct unit, and together, in a variety of combinations, DLO's move toward resolving the General Learning Objective.

NEED
To provide volunteers with training in counseling techniques
GENERAL LEARNING OBJECTIVES
To learn volunteer counseling techniques appropriate to the work done at Bridge
DEFINITIVE LEARNING OBJECTIVE
Be able to list nine of 10 clinics in Chico without notes or other aides

Does one DLO accomplish the whole General Learning Objective? No. But you need several DLO's put together in appropriate sequences to accomplish your General Learning Objective. What we've been talking about is a process by which large, amorphous problems can be whittled down to manageable units of training.

Criteria for Writing Definitive Learning Objectives

Care to dissect a DLO and see what makes it tick? There are three criteria that make a DLO what it is. The criteria

are:

1. The objective must be observable or measurable

2. The level of acceptable performance must be specified

3. All the important conditions for performance must be listed

Measurability

Is our selected DLO measurable by ruler? A measuring spoon? A stop-watch? No, it isn't. The measure is:

. . . A LIST

LIST is the key word. That is how you measure whether or not participants have learned anything. We ask them to do something; to engage in some kind of behavior that is clear to everyone--in this example, to make a list of Chico clinics. That's what measurability is all about. Call it what you want; measurable, behavioral, observable . . . the result is the same. Participants must be able to do something they couldn't have done prior to your training--list, write, recite, enumerate, separate, record, demonstrate--all measurable, do-something verbs. Not general, less measurable verbs like appreciate, or contemplate. That's the clue to whether or not a DLO is in the works--the verbs, and whether they express actions that can be measured easily and directly.

Test yourself. Place a mark in front of the measurable objectives.

1. Participants will know the history of The Bridge.

2. Participants will record the regulations governing the emergency system in Chico hospital.

3. Participants will write the name of every psychologist in Chico.

4. Participants will really understand the role of a hot line volunteer.

If you checked number 1 or 4, you're wrong. Neither you nor anyone else can measure "knowing" or "understanding" just by themselves, and "really understanding" doesn't make it any clearer. If you want to measure knowledge, you will discover

yourself asking people to write, recite, or list, something to demonstrate their knowledge. So why not start that way and not bother with the vague verbs at all? Make life easy for yourself.

Level of Acceptable Performance

If you write a Definitive Learning Objective related to helping someone run the 100-yd. dash, is it safe to assume that you would give him four hours to run it? No. An Acceptable Level of Performance is that the dash be run in 9 to 14 seconds. DLO's should have a clear statement of the level of performance participants will be able to demonstrate after training.

The importance of this criterion is that it helps the trainer focus on his design and training methods. If he wants a very high level of performance, he will have to provide time, practice forms, and a variety of designs to reinforce the material.

We'll provide you a couple of Definitive Learning Objectives (DLO's), and you pick out the measure and the level of acceptable performance. Start with the example we have been using. It is in the Cognitive (knowledge) Domain:

> At the end of training volunteers will be able to list 9 of the 10 clinics in Chico.
>
> The measure is _____.
>
> The level of acceptable performance is _____.

If you said, "List Clinics in Chico" is the measure, you're right. "List" is the verb that describes what the volunteer can do after training.

If you said "9 of the 10" is the level of acceptable performance, you're right.

This means the volunteer has accomplished a definitive objective if he gets 9 out of 10 right.

Try another. This example is in the Skill or Motoric Domain.

> At the end of training volunteers will be able to refer each caller to an appropriate resource in Chico.
>
> The measure is _____.
>
> The level of acceptable performance is _____.

If you said the measure is "Refer each caller," you're correct on your first answer.

If you said "each caller" is the level of acceptable performance, you're only half right. "Each caller to an appropriate resource" is the whole level of acceptable performance. Any one could randomly and continuously refer every caller to someone or other. But it requires a skilled volunteer to make a judgment about the nature of the problem and make an appropriate referral. That's the level you're looking for.

Now let's go on and look at the third and last criterion of a Definitive Learning Objective.

Conditions

In a good DLO, the conditions under which the learner will perform are noted. In our original DLO example the conditions were expressed as ". . . without notes or other aids."

Why bother? Because it helps the trainer select techniques and methods to accomplish the training. Also, as with the Level of Acceptable Performance, some design directions are indicated by conditions. For example, conditions are often positive, or plus conditions, such as working with a partner, or a group, or using books and notes as aids and guides. If you think of those conditions beforehand, you have some idea of the kinds of learning exercises to provide. A plus condition in our example would allow the participants the privilege of using their notes. What we have written is a minus condition; pupils are not permitted any aid other than their own memory.

To summarize, the criteria for a Definitive Learning Objective are:

1. Measurability
2. Level of Acceptable Performance
3. Conditions--plus or minus

Check the criteria you find in the following DLO's.

	Measured or Observed	Level of Accept. Performance	Condition
1. Participants will list eight of ten procedures.			
2. Participants will understand the six steps of the problem solving process without the aid of notes or assistance from others.			
3. Participants will recite 9 of 10 counseling styles without the aid of notes, books, or charts, but with the aid of other participants.			

Answers are on the next page.

If you didn't get checks in the correct places you may wish to reread some of the material we have already been over. You should be able to identify all three criteria of a Definitive Learning Objective before going on.

Answers

	Measured or Observed	Level of Accept. Performance	Condition
1. Participants will list eight of ten procedures.	x	x	
2. Participants will understand the six steps of the problem solving process without the aid of notes or assistance from classmates.		x	x
3. Participants will recite 9 of 10 counseling styles without the aid of notes, books, or charts, but with the aid of other participants.	x	x	x

Skills--The Motoric Domain

So far we have been talking mostly about acquiring new information. You may be thinking, "OK. But there's more to training than listing and reciting." There is; a whole lot more. One item is the entire domain of skill acquisition. Just because you can repeat information doesn't mean you can do anything with it. Sure. You can list ways to improve communication; but putting those ways into practice is another story. Or more to the point, it needs another DLO.

A good part of all training helps people acquire new skills or polish old ones. If Definitive Learning Objectives are of any value, they should be applicable to skills training.

Let's look at examples.

- Participants will be able to type 80 words per minute with no more than four errors.
- Participants will be able to role-play a 15-minute interview. The quality of the performance will be judged by the trainer and other participants according to the principles of interviewing discussed and demonstrated during the training session. Participants will be permitted to use notes.

- Participants will demonstrate the ability to use a 16 mm sound projector. The demonstration will be successful if the participant threads the film so that the picture and sound are synchronized. The projector will be supplied by the trainer.

May we offer a hint? If you're having trouble writing DLO's, write them in a shorthand way first. Put down some words and phrases that capture the essence of what you want. Polish and perfect later. This avoids having to write a perfect DLO from beginning to end right off, a tough task and not very much fun. Please don't let yourself get pushed around by this system. A DLO is just a tool, after all.

Here's an example of what we mean by shorthand. Suppose one wants to help people with interviewing skills. The shorthand notes for the role play interview example might have started out like this:

Measurability: Demonstrate interview system in 10 minute role play?

Acceptable Performance: Our judgment confirmed by rest of participants?

Conditions: No notes! Just like real thing--without a coach.

Sometimes that's all the writing that may be necessary. Other times a more polished DLO is needed. Either way is all right.

Feelings, Values, and Attitudes

"I know the principles of good counseling, and I can use all the techniques. But I don't like drug addicts. They drive me up a wall. I'd rather not talk to them."

Now what? You just trained a person to do a technically competent job. He has the knowledge and the skills he needs. But he still can't be a hot line volunteer. You've now got a training task in what is in the *Affective* area of human activity. The affective area covers feelings, values, and attitudes. Can you write a training design to help? Yes, and the objectives can be measurable, but writing DLO's in the affective domain is difficult. The problem is that you can't see an attitude or a feeling change. All you can do is look for secondary behaviors and infer changes in values, feelings, or attitudes. Let's try one:

--Participants will evidence an attitude change about drug addicts by exhibiting some of the following behaviors:

- ° making unsolicited comments like, "Good grief! I didn't even see that before!"
- ° consciously expurgating sensitive phrases and humor about addicts from their conversations
- ° candidly discussing their own shortcomings in terms of attitudes, rather than saying, "Some people think . . . "

The above behaviors must take place without the trainer suggesting change or programming the volunteers. Setting objectives in the affective area is an imprecise art at best and is the most difficult to work with. One needs all the DLO criteria to work in this very sensitive area, especially the conditions like making sure comments are unsolicited. Even though the affective domain is delicate, affective dynamics are present in every training session and are of immense importance.

One more hint. Here is a simple formula for writing DLO's in the affective domain:

1. First state the area of the affective domain you are training in.

   Example: At the end of training session involving role play, participants will evidence their increased confidence in . . .

2. Then list a series of behaviors that tend to indicate their increased confidence.

   Example: Saying--"I think I can do it."
   "I'm ready to try a real one."
   "That wasn't so bad."
   etc.

3. Then put in any conditions that might be necessary.

   "Without group pressure to make positive statements and demonstrate a willingness to accept failures as well as successes.

May we offer another example of a DLO in the affective area? Try this.

> After training most participants will evidence increased sensitivity to the feelings of older people by spontaneously making such typical remarks as:
>
> "It would really be a drag getting old when everything around you is centered on being young."
>
> "I'll bet old folks get tired of being talked down to."

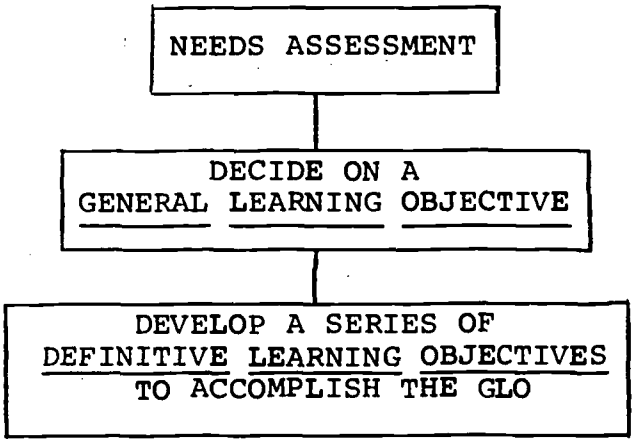
Notice in this DLO example the words "most" and "spontaneously." They establish the level of acceptable performance and the conditions. Obviously, volunteers won't make these exact statements. But they should indicate by some expression, verbal or nonverbal, that a change has come about in attitude or feeling.

You know when people are feeling good at a party. Well, that's the affective domain.

The DLO Process

This, then, is a system for writing Definitive Learning Objectives. It is a flexible method that you can use in your own way. Most important, *you* use the system. Never let it use you--or trainees. Clearly, Definitive Learning Objectives describe terminal behaviors. They are never laid on a trainee just as if he needed his head shaped. Definitive objectives are what trainees may reasonably require of you to help them meet their own objectives which grow out of their own needs.

The process looks like this:



It's doubtlessly apparent by this time that the intent of the system is to provide precise, systematic, controllable learning that meets specified needs. In the context, a couple of things are worth remembering: (1) Definitive Learning Objectives describe what the learner will be able to do after training but not what the trainer will do to help get him there; (2) the process of making a needs assessment, selecting a General Learning Objective, and writing Definitive Learning Objectives, is the way a trainer draws a map that shows where the learner is and where he is going and what he must do to get there.

Should you share your Definitive Learning Objectives, your map, with learners? Sure, if you wish, with the exception of the DLO's in the affective domain. In that domain, the behavior you'll be looking for should be unsolicited and spontaneous.

Start a training design of your own.

NEED

GENERAL LEARNING OBJECTIVE

DEFINITIVE LEARNING OBJECTIVE

THE DEEP END: FOR YOUR CONTINUED READING

Bloom, Benjamin S. (ed.), Taxonomy of Educational Objectives, Handbook: Cognitive Domain, New York: David McKay Co.
A complete treatment of the theory of cognitive domain and sequence in which the domain is developed.

Knowles, Malcolm S., The Modern Practice of Adult Education, New York: Association Press, 1970.
An interesting and detailed account of modern adult education principles.

Krathwohl, David (ed.), Taxonomy of Educational Objectives, Handbook II; Affective Domain, New York: David McKay Co., 1964.
A complete treatment of the theory of affective domain and sequence in which the domain is developed. Heavy reading.

Mager, Robert F., Preparing Instructional Objectives, Belmont, Calif.: Fearon Publishers, 1962.
This book is a programmed learning text for writing DLO's--except in the affective domain. It's a well written book and fun to use.

SECTION II

DESIGN:

PUTTING IT ALL TOGETHER

SECTION II

DESIGN: PUTTING IT ALL TOGETHER

Right now here's where we hope you are:

You know how to make a Needs Assessment--to define a training need...

Can translate it into a...

General Learning Objective (GLO)

and then write...

Definitive Learning Objectives (DLO's)
that give active meaning to the GLO.

Now what?

So far, you know what the volunteers ought to be able to do after training. But you haven't got a group together yet nor do you have any methods. So first things first. Let's talk about groups and group characteristics, then on to climate setting and goal agreement.

The Care and Feeding of Groups

By a group we mean six or more people. Size makes a noticeable difference in terms of the rate of progress. A small group can move faster than a large one. The slow rate of larger groups is due almost entirely to management rather than learning functions, especially when using participative learning techniques. It simply takes time to move people from here to there, get them organized and get out the information. Climate setting takes more time and more skill. Larger groups tend to be impersonal, and it's more difficult to warm them up. Sometimes the combination of slow-down phenomena in a large group creates an atmosphere of heaviness and snail-like movement for almost everyone, and you're likely to hear the complaint, "We're moving too slow."

You can do a variety of things to liven the pace: (1) create smaller task groups that can work independently; (2) actually move faster through the material; (3) create a climate of briskness by starting and stopping on time and reducing time required to generalize; and (4) putting up a schedule so people can see how far they've come and what they must do to finish. Unfortunately, a learning group is somewhat like a stream of traffic. One slow person can hold everyone back. That's one of the problems of group work that learners and trainers both have to live with.

Data flow in large groups is more intricate and takes more time to figure out. It's hard to know what the group thinks. There are too many feelings, too many informal alliances, for you to be able to read the situation quickly. As a result, you have to work harder to maintain control.

The advantage of a large group is mainly that of resources. There are more people to work with, and more interactions and perspectives are possible. But a trainer must be skilled at orchestrating to make use of these advantages.

A small group is limited to a lesser variety of innovations because everyone ends up doing every exercise. The result is a chorus-line effect. Moreover, the trainer is limited to a rap style as against a more forceful, dramatic style. You can't make much of a pitch to six or seven people.

Small groups offer limited human interaction. People get to know one another up to their chosen limits rather rapidly. Then there's no one else to engage, a certain edge is gone, and the vitality is difficult to maintain.

A trainer energizes a group. He doesn't motivate it. Learners come with their own motives, but the group leader sets the pace or the beat. He determines whether it will be ragtime or requiem, and he has a major responsibility in maintaining and managing the energy output of a group. Style makes a significant difference in this context. Some people brim with energy and work a group up very rapidly; the pace is fast, intense, and powerful. Others start slowly, build a solid web of trust, and don't reach full power until much later.

Your style will determine how you'll energize a group. If you're thoughtful, thorough, articulate and concerned, the group will reflect that style and respond by releasing energy in similar or complementary ways. It's important to remember, whatever your style, that you're setting the style and the

group is responding...unless of course, it becomes the classic and well-studied mob. Then you leave by the nearest exit.

Lateness and Absence

In terms of group discipline, one yearns for the era of the mace and leg irons. But if one takes adults seriously, it is important to avoid punishing with childish disciplinary measures--which don't work anyway. You must try to build a group consciousness instead.

Lateness, unexplained absences, and like behaviors drain an incredible amount of energy from a group and cannot, over the long run, be allowed to destroy it. You cannot stand meekly by and watch the process without abdicating your responsiblity. Your responsibility is to help the group control itself. What you can and should do is make the consequences of retarding behaviors clear and give people the opportunity to set group norms that all agree to. You must also take some (but not all) of the responsibility for enforcing the norms. Suppose, for example, punctuality is initially agreed upon as a group norm, but it doesn't happen. Our response is not to punish individual latecomers but to raise lateness in general as an issue at a propitious time. "We agreed to punctuality. It isn't happening. What do you choose to do about it? We can forget it, but if we do, X, Y, and Z are the consequences. Or, we can change our behavior according to the norm. Let me know and I'll be here when you rally want to meet. But it would be helpful if we didn't game each other about this."

When people are unaccountably absent, everyone else wonders why. To our knowledge the only exception is in large, formal gatherings where reliance upon others in the group is neither sought nor encouraged. Anytime a member of a group wants to learn from others and interact, absence is both noticeable and a problem. Mechanically, the group isn't running on all cylinders and is weaker as a consequence. That's a fact. All must be working to avoid the power loss, and it's a group leader's task to raise the absence issue when it is a problem. An integrated interdependent learning group is more like a dinner party than a casual cocktail party. It isn't an in-and-out affair. If you want an in-and-out group, then by all means build one. They are perfectly legitimate. But if that isn't what you had in mind, and yet you get one, you've got to face the issue and get group agreement. You can help by making your own expectations clear in the beginning; not that they will be normative, but that they will be public.

Dawdling--War Stories

A War Story is a term used to describe narratives people sometimes launch into about their own accomplishments, their own projects, and their own experiences. "Well, now. I can remember when that happened to me and..." *Ad Nauseum*. War Stories are bids for membership and, as such, are understandable and even useful up to a point. Most of us have engaged in the process at one time or another. It's a way of saying, "Here I am." There is, however, a point of diminishing returns, and it is reached very rapidly The difficulty with War Stories is that they aren't involving. Only the narrator has had the experience. For everyone else it's vicarious. Occasionally an excellent story teller can enthrall a group, but Mark Twains are rare.

Your responsibility is to manage the War Story Syndrome. You don't want to stop it because if you do you will deny individuals an entry mechanism that may be the only one they really have. On the other hand, you can't let the War Story be the primary medium by which the group gathers and processes data and content. Avoid the dilemma by providing a place for War Stories in the climate setting phase. Let people feel their way into the group. Later, when you begin sharing goals and expectations, describe the effects of War Stories and point out their liabilities. On this basis you can take responsibility for monitoring them, and ask others to do the same. If, however, one or two people don't hear the message and continue to recount the story of their lives, intervene. Simply ask if they would like to speak to data common to the group or state that the narrative doesn't appear to concern most of the others.

So much for the care and feeding of groups.

Climate Setting

What is climate setting, and why do you need it in a training design? Climate setting is really a greeting like saying "Good morning or Welcome." One could take it for granted were it not for the fact that adults have self-images of independence and are often suspicious of schooling and training. They don't always feel comfortable in groups, and initial meetings are edgy. Edgy people don't learn well. So, prior to the beginning of training, participants must feel comfortable and get adjusted to their environment.

Climate setting indicates the tone of the experience to follow. Some tones are cordial, others aren't.Consider Marine Corps

Boot Camp. How's that for setting a tone? Regardless of opinions about that tone, it is set--and in precisely the manner intended. In the training you'll be doing, the volunteers themselves are the greatest learning resources, so you'll want to develop a climate of trust and openness -- the exact opposite of Boot Camp. Don't bellow.

Climate setting addresses three general concerns of learning groups:

- *Trust*
- *Membership*
- *Expectations*

Trust

Dialogue is impossible without trust. Participants need to develop trust in you, trust in their peers, trust in themselves. Turst is developed when people concretely and truthfully show their intentions. If actions don't correspond with words, there's no evidence of intention and therefore no trust. If you say you expect learners to act like adults, then proceed to bleat at them and manipulate them as if they were children, trust will not develop. The climate will be one of Gamesmanship. People will play social games with you and others to mask their unwillingness to enagage in encounter and dialogue.

Trust should be consciously developed rather than left to chance. Trainers use devices to initiate trust and relationship issues before leaping headlong into content. At a social level, these devices are called icebreakers. Their function is to enable everyone to initiate a sufficient number of probes to test the quality, genuineness, and authenticity of the group. We have included a couple of those devices in the Techniques Section. Look at them now on pages 61-67, if you like.

There is no such thing as the one right climate for all occasions. If you are conducting a task workshop, you'll want to set a working climate as opposed to a discussion climate. Choose a climate compatible with the objectives. There are some universal qualities, however. You'll want to set a climate in which each participant becomes aware of his own uniqueness and where the relationship between the trainee and the trainer is cordial, open, and supportive. In addition, physical arrangements should be as comfortable as possible. They should reflect the idea that adults learn best in convenient, informal surroundings.

Climate setting can begin before the group is convened. For example, mail out a brochure or pamphlet written in such a way as to set the tone of the training session--breezy or serious. Pre-involvement instruments, like a learning needs assessment, also may be distributed. They engage the participant in

planning for his own learning by asking him to set forth his goals and objectives, or they pique his interest with a statement, a question, or even a case.

Don't rely on pre-involvement instruments to fully explain the purposes of the training. You'll need to do more when the group convenes.

The first session is the most critical one. If a positive climate is established then, the remainder of the training will be greatly benefitted. There are several climate-setting events in the first session: greeting, introductions, and trainer-trainee relationship building.

Occasionally there is the chance to have a short cocktail party, coffee hour, or similar social event prior to training. This gives the student volunteers a chance to meet with trainers and co-participants on an informal and non-threatening basis. The atmosphere is congenial and informal.

Some training sessions are so short that pre-training social events are not feasible. Then introductions if needed, may begin the session. If a group is small, everyone may introduce himself, or a pair may introduce one another, giving background information suggested by the group. If there is a large group, it can be reduced to small sub-groups for purposes of personal introduction. Everyone should be given an opportunity to make his own name known. Nothing is so embarrassing as calling someone "whatchername" after four days together.

Greetings should convey warmth and respect. Participants who see themselves as valued group members are well on the way to sharing their own unique insights and skills. A cordial, informal welcome reflects the adult's image of himself as a valuable and interesting human being. A trainer need not flit from person to person with the glad hand; that's a shade plastic, but he can start the procedure and then enlist the help of others.

If you want to reduce the formal overtones usually associated with learning situations, informal dress helps. Simply dress as you would for an informal gathering in your home.

Introduce helpful information about logistics and administrative matters early. Give participants an opportunity to ask questions about topics you may have overlooked--facts they may need to know to be comfortable. That way they begin the process of owning the training themselves. Your early use of participant resources will strongly demonstrate behavior compatible with adult education principles. Right at the beginning of a training event people get a clear idea of the direction their training

is heading, the way they will be treated, and how they will be able to contribute.

Trainers have a great deal of power--just as teachers do. You may not be too pleased with that fact, but it's a fact nevertheless. The mantle is culturally vested and not lightly cast off. One of your tasks is to complete a teacher-power transfer from you to the learners. A handy place to begin is during the climate setting phase. Reducing the formality of the session is helpful, and dress is one way. Another way is to encourage people to call you by your first name. Try to use participants' names, too. It will give you a chance to memorize them and create a supportive, friendly atmosphere. Listen carefully to questions and respond appropriately--but say you don't know if you don't. It's terribly important to be open and honest. It's as obvious as all outdoors that belittling participants is poor policy--as is puffing yourself up as supertrainer.

Some questions at the beginning of training are a little on the dumb side. Don't use them as an opportunity to show how swift you are. Participants may laugh, but deep inside they'll know they could get cut, too. They mistrust you as a result. Trust is the most valuable asset the group can create, so trainers should do all they can to help its genesis.

The power transfer is a curious and delicate phenomenon. Early in a training session it's easy for a trainer to get caught in a power dilemma. Participants feel more comfortable with traditionally powerful leadership from a teacher, but they resist it on grounds of adult independence. There are two extremes that ought to be avoided. The first is called the General Patton Syndrome, for want of a worse term. This is the big takeover; the push and pull; bellow and snort. Shape up the troops. The trainer clearly indicates who's boss and presses on at his own pace. Some participants feel secure in the hands of such obviously strong leadership. Most don't, and participation is likely to be low, along with trust. One doesn't have to caricature the part or be ridiculous, but the effect in the same even when a trainer lays down the law with a fist in a velvet glove.

The other extreme is the Dummy Syndrome. The trainer acts like he's just off the boat; he claims no power, no influence, no preferences, nothing. One of his opening gambits may be, "Well, what would you like to do?" A trainee's first impulse is to move toward the trainer with a blunt instrument. A trainer of this sort has a poor notion of what self-directed learning is. His own aimless intellectual sprawl is a hindrance. Trainees didn't convene the session, and they can't be expected to control it. The trainer's abdication leaves them without direction or support. It can be a nightmare.

In between the Patton and Dummy extremes is the trainer who takes initial responsibility for the process of the power transfer and guides it until it is complete by helping people join the group and helping them to offer their ideas and make suggestions. He actively and consciously helps other participate by elicitng responses. He communicates his leadership and the impression that he is able to handle things instead of acting like he doesn't know what's going on.

Initially, the trainer will assume most of the control. He will have a suggested working structure for the body of the workshop in mind, and he will certainly conduct the climate-setting exercises necessary to get the group started. Otherwise, who needs a trainer? If participants were able to convene themselves, build their own teams, diagnose their own needs, plan their own learning actitivities and conduct them, trainers would be about as useful as camels on a freeway.

Membership

Membership is the issue of belonging. It is both a psychological and an intellectual issue. Of the two, the psychological dimension is strongest.

When persons enter groups of any kind, anywhere, they weigh the cost of belonging. In some groups the cost is money, power, prestige; others establish racial norms; still others use manners or conventions. There are literally millions of membership norms. Membership norms can be clearly expressed or it can be assumed that everyone understands. Another way is to have them covertly communicated through games, innuendo, and custom. Assumed or covertly communicated norms are not helpful if the training population is multi-cultured, poor-rich, young-old, black-white, or town-gown.

For example, people who don't have much formal schooling often assume that the cost of belonging to a learning group is either more education, a smarter head, or a larger vocabulary than they possess. As a result, they may respond passively because they perceive themselves as on-lookers--not as bona fide members of the group. Also, everyone wonders what the pecking order is, who is grouped with whom, what games are being played here and there.

Membership norms should be established during climate setting. For example, the trainer can state explicitly what previous experience is appropriate to the group and what different levels of experience are represented. Participants should be encouraged to state their agendas and objectives. The more public information, the better groups are able to function.

The process of establishing secure membership in a group usually persists for almost as long as the group lasts, and it is characterized by occasional ups and downs. It is unreasonable to expect everyone to establish membership at once and consistently

maintain it. Some form of belonging must be reached for everyone, however, or learning will be greatly inhibited. Trainers can nurture membership, taking pains to include those who are having difficulty getting involved. This includes talking with them at breaks, encouraging them, and openly revealing any clique forming or social games people sometimes play. Most important, a trainer must be objective and treat everyone with equal respect.

Expectations

You like to know what's expected of you and by whom. Everyone does. Participants want to know what kind of performance will be required of them, what standards they must meet, and what rewards and punishments there are.

In the kind of education we've been discussing, there are some specific expectations. These require explanation because they're unusual for those familiar only with established patterns of education.

It is difficult for a learner to conceive of a learning situation in which he shares responsibility. Therefore, when you indicate your expections of people insofar as responsibility is concerned, you are introducing a new concept. People may intellectually understand what you say, but unless they are experienced self-learners, their behaviors and feelings will tend to flow in the other direction. They will still want you to assume the accustomed teaching role, particularly when the going gets tough. The expectation of self-responsibility must be reaffirmed and reinforced throughout the session. It is one of the most important things an adult can learn. For example, if a volunteer wants you to tell him what he should learn, your task is to lead him into a self-diagnosis process so that he can determine what he wants to learn. If he asks for answers, ask him, "What does it seem like to you?" "How would you get that information if I weren't here?" "Is there anyone here who can respond to that question?" Small groups and participative exercises take the spotlight off the trainer and put it on participants. Don't get trapped into a"telling role" where you do all the talking, all the answering, all the initiating.

There will be other expectations besides having participants responsible for their own learning. For example, you'll have some objectives in mind, objectives the trainee is expected

to meet. Make your expectations explicit. It isn't necessary to impose your expectations, but you should make them explicit.

This is one of the most difficult aspects of training. When a group is new, no one knows anyone else, at least not in the role of a group member. Expectations don't really exist except in a general sort of way. One doesn't have expectations of strangers. Expectations blossom when capacities are revealed. If we know you're good at training, we'll expect competent work. If we don't know you at all, we don't have any notion of what to expect, but the longer we're together, the greater our expectations of you will become.

When a group first meets, the trainer expects the participants to get with it, and the participants expect the trainer to go to work. Those participants who are indoctrinated with the conventional teaching model want the trainer to set forth his expectations in a clear and logical fashion. They expect him to tell them what to learn. If this were done, trainer expectations would end up by becoming those of the participants without any attempt to determine their own needs.

There have been a lot of experiments with ways to help participants articulate their expectations.

This worksheet is one way. The example is an instrumented technique (written diagnosis) rather than a discussion technique. Both are useful.

This is a worksheet to help you express your expectations of this training and the areas you need to work on most.

I expect this training to cover _____

_____

_____

_____

The areas I need most work in are: _____

_____

_____

_____

I'm confident of my ability in the areas of _____

_____

_____

_____

I expect to spend _____(hours) in this training.

To make my time worthwhile I've got to have _____

_____

_____

_____

_____

Whatever techniques you use, the goal of climate setting is to set the stage. Participants need to develop trust in you, themselves, their peers, and the process. Trust is developed only to the extent trainees perceive themselves as members of the group. The expectations you have of them and they have of you must be shared. The best climate is supportive, genuine, informal, and non-threatening.

Things You Can Do To Set A Positive Climate:

- Choose a well-lighted, well ventilated space ... a quiet one. Provide comfortable chairs.
- Arrange furniture so people can see one another.
- Provide coffee service in the room.
- Provide ash trays for smokers.
- Greet people and provide them with some means to display their own name.
- Dress informally.
- Speak informally.
- Start on time. Keep things moving.
- Greet late comers cordially and bring them up to date.
- Provide means for people to warm up to one another personally before attempting work.
- Take time to discuss the warmup exercise. Find out what happened to the participants--how they're coming along. Trainers call this processing. It means looking at an experience and drawing a general learning conclusion from it.
- Help participants articulate their expectations and let them hear yours.
- Relax.

Things You can Do To Bungle and Set A Lousy Climate:

- Ignore the list above.
- Arrive late...after the participants have been waiting half an hour.

Some Behaviors That Will Tell You The Climate You Want Is Being Established:

- Participants appear relaxed and informal.
- High level of social contact among participants and with you.
- Everyone is engaged; no outsiders quietly (and skeptically) looking on.
- No hesitation of participants to approach or direct questions at you.
- Smiles, nods of approval, good eye contact, everyone awake.
- Evident enthusiasm to move on.

Some Behaviors That Will Tell You A Positive Climate Is Not Present:

- Stiff, nervous people; low social contact.
- Handraising and other formal school behaviors.
- No questions and no evident response to comments.
- Nervous laughter and giggles.
- Side conversations.
- People moving chairs outside the group.
- No levity.
- An awareness on your part that you're working like hell.
- Dawdling at breaks; no evident desire to get back to work.

- Challenging, baiting comments.

- Gamesmanship, like the "what if" game: "What if someone in the group were to say he thought training volunteers is a waste of time?" rather than a direct personal statement such as, "I'm wasting my time."

Remedial Action--Climate Setting

If you've botched the initial climate setting phase, a quick remedy isn't usually possible. It's rather like trying to repair a *faux pas* right after making it. Somehow the water seems to get hotter. So, wait. Just let it alone until there is an opportunity to do more climate setting at another time like the beginning of the next session. Or, if you're up to it, just admit the difficulty, and try something else to set climate. Usually people want to see you succeed and will try to help you out of hot water.

Goal Agreement

The only worthwhile agreement about objectives is the one the trainer finally reaches with people he's actually training. It makes no difference what others may desire--supervisors, bosses, parents, deans, captains, politicians, and fairy godmothers--adults will utimately learn only what they personally agree to learn. Even if you build a sophisticated design with a host of objectives (a practice we strongly recommend), the final, workable contract is a design negotiated by the whole group. Otherwise, self-directed learning for adults is an empty, senseless non-term.

At the point of goal agreement, the learner has an opportunity to specify his needs (in comparison with the ones the trainer decided upon during his need assessment) and make a decision as to whether or not his needs can be met in the training. You're not asking participants to start from ground zero and create needs out of thin air. You guide them. You're asking them to check their own needs against those you've assessed. When you first did a needs assessment, you probed for data, formed it, wrote general and definitive learning objectives and thought of ways to accomplish them (techniques). That's what you share during the goal agreement phase, which comes right after climate setting. If you did well in your assessment, very little alteration will be required. Participants will recognize a response to their own needs and be more than pleased to agree on the general learning objectives. They will take the design for themselves and think of it as their own. That is the ideal way to help a group reach an agreement about objectives.

Practically, the process may be more complex than that and not nearly so tidy. More often than not, your original need assessment data will not be supplied by participants. For example, suppose you agree to assist in a neighborhood group to staff a co-op nursery. People in the neighborhood will express a few ways in which volunteers should be prepared; you will have some ideas of your own arising from your experience, and the volunteers themselves may or may not have some ideas as to how they should be prepared. In any event, you probably will have an idea of what you want to do in the way of training before the project gets under way. So, in essence volunteers "come to training" rather than shape it in direct response to their peculiar needs. As a result, when the trainer tries to reach a goal agreement with the volunteers, it may be that there are such wide variations between his own diagnosis and theirs that the original design is useless. Any salvation? Yes.

It is quite appropriate and well within the canons of adult education theory to engage participants in an on-the-spot assessment of their own competencies relative to an established list of competencies generated by you and others knowledgeable in the field. Approached in this manner, the participants are able to express learning needs within the framework of what they must know to complete the task of being volunteers. The procedure is usually efficient and speedy; on one side of the board list the required competencies, on the other side, the competencies people already have. At the conclusion participants don't feel as though they have been pressured to conform or to learn useless information. One assumes, of course, that the design you build will enable participants to acquire the competencies they lack.

There are limits. A trainer cannot create one universal design into which an infinity of content fits. There may be, therefore, participant needs you cannot meet. That's OK. Don't be afraid to say so. If you have seriously misread the needs, convene either a fish-bowl* session right on the spot or suggest that participants choose a committee to meet with you for purposes of design. A clear miss on design is a rare thing unless you've missed the whole scene, essence and all, which is improbable. Nine out of ten times, your design will be close to participant needs; so close, in fact, that participants will wonder why you bothered with goal agreement at all, since there is so little difference between your general learning objectives and theirs.

*A fish-bowl is a group chosen from participants convened to work on a task on-the-spot while the remainder of the participants watch.

Does the tentative design you bring to the group violate the principle of adult self-direction? Not really. Participants do a lot better diagnosing their own needs and clarifying their objectives if there is a design against which to judge their own responses rather than an infinity of possibilities. You may not choose to reveal your design first; that is, it is legitimate to ask participants to write their objectives and then compare them with yours. This method prevents your natural authority as a trainer from becoming the decisive criterion in selection of goals. Even so, by being clear, you're not being autocratic. There is no requirement that participants accept your design *carte blanche* and no reason why you cannot redesign according to unforeseen problems. If you were going to help someone choose a car, you'd probably not wave vaguely at a bin or two of undifferentiated parts with the question, "What do you want?" Quite the contrary, you'd show a complete model and ask if it fits the needs, and if not, what alterations have to be made to make it do so.

As soon as participants and the trainer have agreed upon the goals, the whole group mutually owns them. It's no longer the trainer's responsibility to drag everyone else around to his goals. The group has goals for which the group itself is responsible. The trainer is a resource, and an important one, but not the only one. At this point, the responsibility for learning is exactly where most adults prefer it, right on their own shoulders.

The trainer's role remains a significant one. There is still a great deal of work for him to do: facilitating, summarizing, managing, and processing. The goals, however, belong to the participants, and the trainer is only responsible for providing ways and means. If some don't choose to learn, nothing the trainer can say or do will change things. That's what we mean when we say, don't take responsibility that rightfully belongs to learners.

Every once in a while, you'll see remarks to the effect that trainers (or teachers, or someone) ought to motivate people. Ignore them. You cannot motivate people. Whenever we hear those remarks we imagine winding up a toy car to a screaming pitch and watching it carom off a wall. People aren't wound up or motivated in the abstract by you or anyone else. We all get interested in specific things for specific reasons. There are particular segments of programs, events, and professions that are motivators but you can't just up and motivate people.

A typical motivator is money; another is pride in workmanship, another is goal agreement. The two parts of a training design specifically intended to serve as motivators are goal agreement and climate setting. They are meant to help people adjust

comfortably to a new environment and get a clear notion of how their own needs can be met through training. Those things should help add a pinch of enthusiasm to their lives--and so much the better. That's about as far as you need to go--or can go--in motivating, other than providing useful, interesting training. Nothing is quite so tiresome as a trainer (or anyone else) bucking up the learners. Of course, if you're bored and could care less about what's going on, you'll send a signal that says the training isn't very interesting, and participants will pick it up.

So here is what you have to do: provide clear goals for participants to respond to and help them come to some agreement about goals. Come to some explicit agreement as to which goals you want to accomplish together (given available resources). That is your learning contract.

Things You Can Do To Reach Goal Agreement

- Provide participants with something to help them make their own goals and objectives specific--a worksheet, for example.
- Provide a list of goals and objectives your needs assessment caused you to include in the design.
- Take time to compare participants' goals with yours, and note both likenesses and differences. Check for clarity.
- List the limitations of your design.
- Provide a mechanism (small groups) whereby participants can discuss all the goals and objectives, plus limitations, and produce a revised set of goals and objectives they can live with.
- List the final goals and state the agreement publicly. Check for concensus.
- Maintain a climate of openness, trust, and responsiveness.

Things You Can Do To Muck Up Goal Agreement

- Infer, state, or in any way communicate the idea that you're going to do your own thing in spite of new data from participants.
- Be vague about your goals and objectives.

- Allow participants to be vague about their goals and objectives.
- Say "yes" to everything just to be nice.
- Keep some of your agendas hidden.
- Ignore the goal agreement phase altogether.
- Rely wholly on off-hand comments of one or two influential people (like sponsors, supervisors, etc.).
- Rely wholly on coffee-break rumors.
- Fail to listen.
- Fail to write down the final goals for the whole group.

Some Behaviors That Tell You Goal Agreement Hasn't Been Reached

- Passive silence.
- Lots of argument over goals; a split house.
- Remarks like "What are we going to do in this training?"
- Inability of the group to get to a task.

Game Learners Play in the Goal Agreement Phase

- Hiding real goals.
- Stating someone else's goal.
- Giving verbal agreement to a goal in a large group and taking the opposite position in a small group of their own choosing.
- Abstaining; making no commitment at all; the missing ante in the poker game.
- Pretending to be dumb.
- Running in outside information; "We were told that . . ."

- Loading the responsibility on you; "You go ahead and tell us what to do. You're the teacher."
- Reserving judgement; "I'll let you know as we go along."
- Adding goal, after goal, after goal as a tactic to block group progress.

Games Trainers Play in the Goal Agreement Phase

- Saying "yeh, un huh," to learners' requests with no intention of changing the design.
- Rewording learners' comments so they fit the pre-conceived design anyway.
- Martyr: "Well, if you don't want to do what I suggest (sigh), then I suppose..."
- Keeping trainees purposely vague so they can be blamed for failure, if and when it occurs.
- Putting the whole responsibility on trainees: "Well, if you don't know what you want..."
- Contracting for a task group and running a T-Group, or vice versa.
- Using learners' ignorance to mask trainer's ignorance.
- Playing dumb.
- Refusing to say a word or help in any way on grounds that doing so is a violation of the principle of self-direction.
- Hiding real goals.

Remedial Action

Goal agreement is essentially a mechanical act and is not as psychologically sensitive as climate setting. If you don't get agreement, try asking the group to help discover why agreement is hard to reach. Usually people will begin to surface concerns with which you can deal fairly rapidly. The secret is to make it a group concern. It isn't just the trainer's worry. And by all means make it public. Prevent proliferation of hidden agendas.

Summary

Thus far we've covered:

- *Need Assessment*
- *Writing General Learning Objectives*
- *Writing Definitive Learning Objectives*

We've met our group and:

- *Set the climate*
- *Agreed on the goals*

Now. Look at the design we've started on the following page.

This is for a projected two-hour session.

After that, we're ready to move into the learning activities themselves in the Technique Section.

TRAINING DESIGN

General Learning Objective	To learn the objectives of Bridge and techniques of serving as a hot line volunteer
Definitive Learning Objectives	1) At the end of training participants will be able to recite all three types of services Bridge offers without the use of notes or other resources. 2) At the end of training the participants will be able to identify by name the person to whom they will be immediately responsible. 3) At the end of training participants will be able to list the four primary functions of a hot line volunteer without aid of notes or other resources. 4) At the end of training participants will be able to demonstrate the ability to receive a client's call and process it according to established procedures. The trainer will judge the level of competence.

TIME	FUNCTION	HOW
9:00-9:45	Establish Learning Climate	Introduce self, welcome volunteers, share agenda, pass out name tags, ask participants to choose a picture from a magazine that best illustrates their reason for joining Bridge, share in small groups, introduce Bridge staff.
9:45-10:15	Goal Agreement	1) Ask participants to write expectations of training, where they need help most, things they must have to make training time worthwhile. 2) List trainers expectations and goals; compare with those listed by participants. Note similarities, identify expectations training will not meet. 3) Check consensus, list learning objectives.
10:15-11:30	Plan for Achieving the Definitive Objective	1) Lecture-Discussion with charts and visual aids (if appropriate) 2) Question answer period 3) Demonstration of phone technique and procedures. 4) Role play in trios; client, volunteer, and observer.
11:30-12:00	Evaluation	Verbal check to see how involved learners are; questions to see if DLO's 1 and 2 have been met; random check on DLO 3. Random role play demonstration of DLO 4 and discussion.

NOTE: You can use the design form that follows to prepare a design of your own.

TRAINING DESIGN

General Learning Objective		
Definitive Learning Objective		
TIME	FUNCTION	HOW
	Establishing Learning Climate	
	Goal Agreement	
	Plan for Achieving the Definitive Objectives	
	Evaluation	

THE DEEP END: FOR YOUR CONTINUED READING

Margolis, Fredric H., Training by Objectives: A Participant Oriented Approach, Cambridge: McBer and Co. (available from F M Associates, Ltd., 1725 K Street, N. W., Washington, D. C. 20006), 1970.

A specific and practical approach to designing and implementing a training program using examples from the Office of Economic Opportunity program. Has a programmed instruction format.

Miles, Matthew B., Learning to Work in Groups, New York: Teachers College Press, 1959.

A thoroughly readable book and probably the best single reference in the field.

SECTION III

TECHNIQUES:

HOW TO USE THEM

SECTION III

TECHNIQUES: HOW TO USE THEM

It is important for beginning trainers to be familiar with a few techniques--how-to-do-it devices. The world of training often seems shrouded in a cloak of mystery and to some, only the occult explains a trainer's task. It isn't really that way. But it is true that a trainer does his job best when he gives the impression of effortlessly gliding along, doing and saying very little. One wonders what, if anything, he is up to, and it's no surprise that new trainers are a bit anxious about how they should get things moving. Moreover, no one wants to lose face, and especially when he's in front of a group, he wants something to do or say. If one has command of three or four sure-fire exercises, devices, or techniques, he feels a great deal more secure.

This section offers a few techniques--just a few. This is by no means an exhaustive list, but it includes techniques for every participative step of training--climate setting techniques, goal agreement and evaluation techniques, and general training techniques.

This manual will give you a start and you'll eventually recognize the relative importance of techniques. Experienced trainers rely more upon objectives and group needs than they do upon techniques. They have command of a great many techniques, true, and they even invent them on the spot, but they concentrate on the end rather than the means. They know that any number of techniques will reach the same goal.

Some trainers focus on goals and objectives and select techniques appropriate to them. Others tend to focus on techniques and then find goals and objectives to fit--which is OK as long as the objectives do fit the group needs. Each of us has to begin where he can.

The techniques included here can be used by less experienced trainers. They are presented in order of difficulty, from easy to hard. If there are special precautions, they're noted. There's an overall reminder, too, and it applies to all the exercises: The purpose of an exercise is to create data for learning. After each exercise the data must be processed so learners can reflect upon their experience and generalize from it. An exercise is not useful for its own sake or to fill time. Many of the suggestions are like games--such as the square building exercise. Nevertheless, the purposes are serious ,

the focus is on the dynamics of the exercise, the action and involvement, and these techniques produce data of real learning value.

Criteria for Selecting Techniques

Most of us select techniques on the basis of intuition or because they feel right. There are no formulas for selecting techniques. But good trainers always stop and examine those they intend to use to be sure that they are appropriate, and there are some basic criteria that are helpful.

Comfort, Confidence, Competence

You already know that one trainer might not be able to deliver what another could do in his sleep. And you've probably seen enough variety of approach and style to know that one trainer can be comfortable and effective with certain techniques that would be awkward or impossible for another.

Don't be afraid to say, "That approach is not for me. It makes me uncomfortable." One of the marks of the professional trainer is his ability to be in touch with his own skills and feelings.

Another thought to keep in mind is that it is usually nonproductive for learners to pin a trainer down to a packaged design in the hope of having a more structured training session. The trainer has to decide what he's comfortable doing and how he will operate best. As training proceeds, he must have flexibility; he must be able to select the techniques and design of the learning experiences. In these areas he should not be controlled by the group but simply be in tune with it.

In any event, it is clearly a mistake to allow yourself to be forced into using techniques about which you are unsure. If you don't feel comfortable, confident, and competent, this will be communicated to the learners, and they will be uncomfortable. To emphasize the point, a trainer must remain very aware of what kinds of behavior and techniques make the group uncomfortable or leave them questioning his own motivations or skills. Every group has its sensitivities. Some might object to unstructured training methods. Others might object to profanity or techniques that bring in politics or religion. The trainer must be aware of these sensitive areas in his selection of techniques because trainees learn more when they are psychologically as well as physically comfortable.

Congruence with Desired Objective

Some techniques are more effective in one domain than another. Here is a sample of techniques appropriate for each domain.

Cognitive Domain	Skill Domain	Affective Domain
Lecture	Role-Play & Psycho drama	Small-group discussions
Reading & Research	Practice Sessions	Feedback Opportunities
Demonstrations	Negotiation Exercises	"Getting to Know" Exercises
	Simulations	Nonverbal exercises

One of the biggest traps you will find in training is the temptation to select techniques because they seem to convey information, yet this is only useful if the training is in the cognitive domain. When working with affective objectives, information is of little value. The fact that one knows something does not mean he will change his behavior. Many people know that racism is illogical, yet they still do not change their opinions or behavior. This is equally true for the skill domain. Information is secondary. You can give a person all the information there is about how to ride a bicycle, but he will never be able to ride until he has practiced riding.

It is necessary to make a distinction between techniques useful in cognitive learning experiences--lectures, reading assignments, etc., and those like simulations, practice sessions, nonverbal exercises, or feedback that are more adaptable to skill or to affective objectives.

Maximizing Trainee Participation

The foundation of training is that trainees learn best by doing and experiencing. Some techniques are more likely to elicit full participation than others, and a trainer who is alert to ways to involve as much of the group as possible can usually find ways that work. For example, he can deflect questions to the whole group when appropriate instead of answering them directly himself. He can have others recall an experience in training instead of presenting one himself.

Generally, if more than an hour goes by without some opportunity for the participants to take part and do things for themselves, the design needs to be changed.

Multiple Learning

Trainers should always try to find techniques that involve a variety of learning experiences at the same time. A good example would be an experience that simultaneously will allow people to learn something about how to get to know people quickly in new situations. If you work at it, you will usually find that you can accomplish quite a number of Definitive Learning Objectives in one session with the use of relatively few techniques.

Problem-Oriented vs. Subject-Oriented

Most of us wonder about a definition of training and are interested in the difference between teaching and training. Teaching is subject-oriented. In teaching, one presents a subject as effectively as possible. Training, on the other hand, is problem-oriented. In training, one brings skills, concepts, and techniques to help solve real problems--the learners' problems--and therefore what we do is problem-oriented.

Let's look at some of the reasons why one selects methods and designs directed at solution of learners' problems.

- Training has immediate applicability. People are more involved in "solving this problem" than in "learning more about that subject."
- Learners become intensely involved in trying to get their own problems solved. They see training can do something important for them.
- Training provides real solutions and answers to real issues which can be used on the job, and it makes good use of time.
- The results of the learning experience are more immediately apparent, "Now I know the answer; now I know how to do that," versus, "Now I know more about that subject." Nothing makes us try harder than perceived success.

Closeness to Real Life

In general, the more a technique approaches a real-life situation of the learner, the more it reinforces feelings that, "This learning applies to me and can be useful." For example, if the objective of the training session is to have learners critique a volunteer activity report, it is far less effective for a trainer to produce a report he once wrote and ask the group to critique it than it is for him to ask the trainees to produce their own activity reports to be critiqued.

In selecting techniques, a trainer should try to select examples and illustrations related to the actual activities, experiences, and climate of the training program. This assures that everyone will know what is being talked about and will have been personally involved in it. It guarantees that the experiences will be fresh and distinct. But there are important exceptions.

For example, the NASA Exercise is about rockets to the moon. What does that have to do with student volunteerism? Just this: The focus of the exercise is on the way in which a group comes to consensus. The content (rocket ships) has no importance. The intention of the exercise is to provide synthetic data to create a dynamic process (consensus building) which happens quickly and clearly and avoids the trap of someone opting out by saying, "That's not how we do it on our campus." If you wish to invent a technique that reaches the same goals and is more related to student volunteerism, fine, but the point is that not every example or exercise you use needs to be nailed to student volunteer activities. People can be trusted to make connections and carry what they have learned from subject area to subject area as long as the principles of the learning exercise come through clearly.

Maximize Uniqueness

One of the exciting features of training is that in every session each participant can experience some personal growth. He can leave with renewed self-confidence and self-assurance. His individuality and his uniqueness can be reaffirmed. When people feel affirmed in those ways, the learning they can achieve is truly amazing.

One of the ways to help assure that your training has this result is to ask yourself before each session whether the techniques will help maximize autonomy and uniqueness. Group needs assessment, mutual goal-setting, and continuing mutual reassessment of those goals are excellent examples of techniques for maximizing this personal affirmation.

Achieving The Desired Objective

After you've selected your technique and it meets all the other criteria we've just worked through, don't be reluctant to ask yourself once again, "Will it really get me where I want to go?" And don't be afraid to throw out your technique if the answer is no. Also, don't get discouraged if you do this several times. This is the most frustrating part of training and the best trainers often throw out many techniques before finally selecting those they use. If you don't throw out techniques or even whole designs from time to time, maybe you ought to re-examine your whole approach.

Artistic Flow

No matter how good a particular technique or method may be, it will lose its effectiveness if repeated too frequently. Part of good training is the ability to combine different techniques so that the overall program has variety and change of pace.

Take ten minutes of lecture, three task-oriented small groups, a report-out, a tabulation, some non-directed whole-group discussion, two non-verbal exercises, garnish with recall... *et voila!*

Can you meet all the above criteria in every design? Of course not. This is simply a checklist you can use as a test before you stand up in front of a group. We can assure you that the more of them you are able to meet, the more effective your training will be.

Training Exercises

The following thirty-two pages contain three climate setting exercises, three goal agreement exercises, and eight learning activities exercises. In each category they start with the easiest and move to the more complex. The instructions should not be interpreted rigidly but used as a guide. Since this is a loose leaf manual, you may add other training exercises you like and can use.

Before attempting to conduct an exercise, be sure you understand the meaning of the terms used to describe these methods.

A lecture in the training session is usually brief and is sometimes called a "lecturette." It is a five to forty-five minute talk by a trainer to identify or explain a theory prior to a structured exercise.

A discussion is a conversation situation in which two or more people make statements and ask questions of one another for the purpose of persuading, clarifying, and informing.

A discussion group brings more than two together for a pooling of ideas. A task group is assigned a specific task with specific goals. Members are expected to make decisions and take action.

A group is several persons working in a direct face-to-face situation that suggests but does not demand collaboration. Group process refers to the way the group works rather than what is being discussed.

In role playing, an individual spontaneously acts out the part of another individual in a defined situation. It is an action centered technique providing the group with the common experience of behaviors that can be observed, analyzed, and improved.

Films are good training techniques, and can be used to study decision making, conflicting values, problem solving, leadership, influence and power, and group membership. A film is best used as a support element to a training activity. Participants should be actively involved in viewing. They may cite incidents of behavior, or make predictions rather than view it passively. The trainer should know the film well and explain the purpose for which it is being shown.

Title

Getting Acquainted

Goal

To facilitate the participation of individuals in a new group.

To share expectations of the training program with other members of the new group.

Time

90 minutes

Handouts

None

Group Size

Unlimited number of trios

TIME	CONTENT	METHOD
20 minutes	Trainer welcomes group members and asks them to divide into groups of three and introduce themselves.	lecturette
20 minutes	Participants introduce other member of their trios to the full group.	full groups
5 minutes	Trainer explains the goals of the training program and gives overview to full group.	lecturette

TRAINING EXERCISES

CLIMATE SETTING

TIME	CONTENT	METHOD
20 minutes	Trainer instructs trainees to regroup in original trios and discuss the training program as it has been explained. Participants are instructed to compare their earlier expectations of the training program with what they now know about its structure and purposes.	trios
20 minutes (if needed)	Participants share their expectations of training with other members of the full group. Trainers and participants negotiate on what can be changed.	full group

Process Notes

The welcome should be warm but brief. Tell participants what they need to know before the session starts, but it is not necessary to repeat everything they have already been told by mail or by handout when they arrived.

The trainer should have in mind some way to separate the group into trios. The easiest way is to simply point out trios or start with one person and make up the trios consecutively as the people happen to be seated.

In the introduction in trios, participants should be asked to give not only their names but a little background--where they are from, and the type of student volunteer work they do. But encourage participants to keep introductions brief when in trios and when back in the full group.

Title

Interest Statements

Goal

To allow participants to become acquainted with one another quickly by hearing the reasons for involving themselves in a student volunteer training program.

To share expectations of the training program.

Time

60-75 minutes

Handouts

Newsprint and markers

Group Size

Six to eight participants

TIME	CONTENT	METHOD
10-15 minutes	Trainer introduces the rationale for the session by indicating the different concepts of the agendas that people bring to any group situation.	lecturette
10-15 minutes	Trainer asks for check of participants' perceptions and opinions of differing agendas.	question and answer
15 minutes	Participants compare their list of agenda ideas and list on newsprint. These lists are posted on walls.	duos(pairs)
25-30 minutes	Trainees as total group compare expectations and identify common interests in the training program.	total group

Process Notes

This is a climate setting not a goal agreement exercise. Participants are simply talking about why they are there and what they hope to learn.

This is not only a get acquainted experience for the participant, it is a learning process for the trainer. He can begin to get some idea of whether his own design fits the expectations of the group and how much group consensus exists at this early period.

Posting the lists of expectations on the walls give each participant an idea of how closely their expectations match. The trainer should assist in identifying common and achievable expectations participants have chosen to display.

Title

Group Conversation

Goals

To develop an open climate and readiness for interaction in a group by sharing the commonalities of personal experience in areas of student volunteer work.

Time

30 minutes

Handouts

None

Group Size

Eight is about right. It can be done with fewer or more, but the experience can become more or less intense depending on the group size. Usually, the smaller groups are more intense.

TIME	CONTENT	METHOD
2 minutes	Trainer comments on dynamics that exist when a group of unfamiliar people get together to work. "It will take time for people to work together on a task or feel comfortable enough to share their concerns and ideas with others..."	lecturette
25 minutes	Trainer suggests the participants describe in one or two words their answer to "Right now I feel..." (Example: "Right now I feel excited and anxious.")	participants, including trainer, respond and discuss their feelings

Process Notes

The length of the exercise depends on the size of the group and its response. The leader must not let this drag on after group

loses interest.

Suggest that participants use just one or two words to express the way they feel. Note that the trainer, too, tells how he feels. He should be honest about it.

TRAINING EXERCISES

GOAL AGREEMENT

Title

Stating Your Expectations and Goals

Goals

To develop a broader view of the group's goals.

To share one's own goals with other members of the group.

Time

60 minutes

Handouts

None

Group Size

Eight - 12. Can be fewer or more participants. Size of group will affect the length of the exercise.

TIME	CONTENT	METHOD
10 minutes	Trainer gives overview of the workshop or conference and asks members of group to take several minutes to reflect on the expectations and goals they had for the workshop before they arrived. Then the trainer asks the participants to divide into pairs and compare their goals with one another.	lecturette
30 minutes	A participant volunteers to list the individual goals on newsprint that participants have shared with the group or recorded on their own sheets of paper.	group discussion
10 minutes	Total group analyzes goal sheet (on newsprint) and sets priorities. Trainer discusses which goals fall within the parameters of the workshop and which goals are not planned for inclusion. Total group agrees on the list of goals for the workshop.	total group

Process Notes

This technique for goal setting permits the freest expression by participants. They express their goals before the trainer has shown his. The trainer must be skillful in rejecting goals that do not belong on the list.

In some instances it may take more than 10 minutes to reach a consensus on goals.

As agreement is reached, accepted goals are listed on another sheet of newsprint.

Title

Goal Sharing

Goal

To share and agree upon goals for the training program.

Time

60 minutes

Handouts

A partial list of the major goals for the workshop as prepared by the trainer.

Group Size

Eight - 12. Can be fewer or more participants. Size will affect the time required.

TIME	CONTENT	METHOD
15 minutes	Trainer distributes general goals sheet which lists some of the major goals for the workshop. Trainer reviews the list with participants and suggests to them that they develop additional goals that they feel are appropriate for the workshop.	lecturette
45 minutes	Participants share their goal suggestions with the total group. The goals are recorded on newsprint and a priority agreed to. A check is made to determine the participants satisfaction with the final list.	full group discussion

Process Notes

In this goal setting technique the trainer starts by sharing the goals he has already prepared. He makes it clear that this is incomplete and it is up to the participants to add or subtract.

The trainer must be careful not to appear to be imposing his own list on the group, but he must also be ready to show why

some of those added by participants are impossible or outside the parameter of this training.

Title

Goal and Schedule Agreement

Goal

To share goals expectations with other participants and to reach agreement on the goals.

Handouts

Training schedule and partial list of goals

Time

60 minutes

Group Size

8-12 More or less if necessary

TIME	CONTENT	METHOD
10 minutes	Trainer presents the training schedule including list of goals to participants and directs them to divide into pairs to discuss it.	lecturette
15 minutes	Pairs discuss what goals could be reached as a result of their participation in training. Also, they make observations on areas where the training design does not meet their needs.	pairs
35 minutes	Total group sharing of the observations made in the pairings. Total group revises goals and schedule according to their conclusions. As agreement is reached, items are listed on newsprint.	full group discussion

Process Notes

This technique permits not only discussion of goals but of the whole training schedule. An inexperienced trainer may find his whole design revised or replaced. Experienced trainers seldom have too much difficulty because they are flexible.

Note that the basic discussion of goals and schedule is by

pairs. When the group reassembles, get suggestions from each pair, moving along form one to another. Do not let one pair dominate the session.

TRAINING EXERCISES

o

LEARNING ACTIVITIES

Title

Agenda Building

Goals

To build an agenda.

Handouts

None

Time

20 to 30 minutes

Group Size

6 to 12

TIME	CONTENT	METHOD
5 minutes	Trainer emphasizes the importance of the participants clearly recognizing the subject (agenda building) and the goal (understanding the agenda building process).	lecturette
10 minutes	Trainer asks participants as a group or in smaller teams to brainstorm a list of activities that are important for developing an agenda for a meeting.	
10-15 minutes	The total group gives a sequence to the activities, discusses the implications of neglecting any of the steps, and identifies ways to combine steps for efficiency.	group discussion

Process Notes

This technique is basic participative training. The leader states the subject and goal. Small teams bring out ideas. The group reaches a consensus.

Title

Sharing resources

Goals

To provide for a sharing of information about resources among participants.

Time

45 minutes

Handouts

Name tags if needed

Group Size

4 or more

TIME	CONTENT	METHOD
5 minutes	Trainer indicates his awareness of the many types of resources present at the workshop. The trainer might ask that some criteria for sharing resource information be established.	lecturette
20 minutes	The trainer asks the group to divide into pairs, make introductions, and share resource information.	pairs
20 minutes	Trainer has pairs form into quartets to share resource information. One member of the quartet records resource information next to person's name on newsprint. Information is hung on walls.	quartets
	Trainer reconvenes total group and asks them to study resource sheets. There is no formal closure to this session. The participants are to spend as much time as they wish visiting with one another and reviewing posted resource lists.	total group

Process Notes

The objective here is to let every participant find out who knows what or can do what in the group. The most important task of the trainer is to make sure everyone understands what is meant by "resources" and that in recording resources, the criteria are observed.

Title

Not Listening

Goal

To allow participants to experience the frustration of not being heard and not listening.

Time

60 minutes

Group Size

Any number of pairs

TIME	CONTENT	METHOD
5 minutes	Trainer introduces the session by commenting on the fact that most of our communication problems stem from not listening to what others are saying.	lecturette
10 minutes	Trainer divides group into pairs and distributes role plays to each pair. (See next page.) This role play demonstrates the frustration of not being heard.	
	Participants are given time to get into their roles.	reading role plays alone
15 minutes	When participants appear ready, the trainer starts the role plays and continues them until it appears that there is a high level of discord.	role plays
30 minutes	Trainer leads discussion on the frustration of not being heard. Responses to the exercise are listed on newsprint.	group discussion

Process Notes

There must be enough space to permit pairs to role play without interference. The trainer moves from pair to pair and observes and listens. If any pair seems to be reaching an agreement, the trainer reminds them of their roles.

ROLE PLAY

CLIENT'S ROLE

INSTRUCTIONS:

You have just moved into the city to take a job with a small, local concern. Upon arriving two days ago, you were informed by this company that the position had to be dropped.

The situation now is that you are unemployed and your funds are running out. To make matters worse, your youngest child awoke this morning with a temperature of 103°. You called the company again, but all they could suggest was that you contact your local neighborhood center.

You are about to talk to a staff member to get help. You must make him understand the seriousness of your situation. You are quite upset, and therefore, feel you have no time to waste in small talk. You feel that the staff member's sole concern should be to give you the help you need immediately.

ROLE PLAY

STAFF WORKER ROLE

INSTRUCTIONS:

You have been a volunteer staff worker for two months at the Neighborhood Center. You have come to realize that one of the biggest problems you face while performing your job is that most of the people you try to help have preset notions about what you should do for them.

It has become increasingly obvious to you that the main solution to this problem is to tell the people what the services are that the Center offers. You feel very strongly that if the client only knew what was actually available for him, he would be in a much better position to be helped.

Furthermore, you resent a little those clients who make demands on you rather than listening to what you have to say. After all, you do know what you're talking about.

You therefore have decided that within the first few minutes of any interview, you will make sure that each client knows (1) exactly what the various services of the neighborhood center are, and (2) how these services can be used.

Title

Brainstorming and Processing of Ideas

Goals

To generate ideas or solutions to a problem by listing them and not evaluating them.

Time

60 - 105 minutes

Handouts

None

Group Size

6-10

TIME	CONTENT	METHOD
5 minutes	Trainer discusses the problem solving process. The group is directed to select a secretary. The group forms a circle with their chairs and the secretary is directed to record every idea on newsprint.	lecturette
	The ground rules are read to the group. They are: there is to be no criticism or evaluation during the brainstorming phase; far out ideas are encouraged as are practical ones; quantity is desired.	
	The trainer reads a problem. The problem can be any one that is relative to student volunteers. For example, "In what ways can we get more money for our program".	group brainstorms and lists ideas
15 minutes	The group has 15 minutes to generate ideas.	

TIME	CONTENT	METHOD
20 minutes	The secretary calls time after 15 minutes and notifies the group that the ban on criticism is over and asks them to evaluate their ideas and select their best ones.	
20 minutes	If there is more than one group, the trainer asks the two groups to form one group, share ideas and form a single list. The participants are asked to build together ideas that might be used in combination. The secretaries act as spokemen for the groups.	groups of 6 form group of 12
30 minutes	The trainer writes the final list on newsprint and asks the total group to rank order them.	record on newsprint
	Following the rank ordering of ideas, the total group discusses and evaluates the brainstorming and problem solving techniques used in the session.	group prioritizes list

Process Notes

The trainer's job is primarily that of restraining criticism or evaluation during the brainstorming session. That is the time to let ideas out, not comment on them.

Title

Getting Consensus - NASA Exercise

Goals

To compare the results of individual versus group decision making.

To diagnose the level of development in a task-oriented group.

Time

60 minutes

Group Size

60 to 12 people

Handouts

NASA Exercise Individual Worksheet. NASA Exercise Answer Sheet. (See following samples)

TIME	CONTENT	METHOD
5 minutes	Groups of 6 or more or several groups should be seated in a circle(s). Each participant receives an individual worksheet. Trainer explains the task to the participants.	lecturette
15 minutes	Trainer gives individuals time to work alone to complete their own list.	individuals
30 minutes	Trainer has group work on the exercise. Individuals are instructed: (a) not to change any answers on their individual score sheets, (b) have one member of their group record the consensus decisions on paper, (c) the group has 30 minutes to complete the task. Some guides for people reaching consensus are: 1) avoid arguing; use logic 2) support only decisions to which you can agree somewhat	groups of six list 5 quidelines on newsprint

NASA EXERCISE INDIVIDUAL WORKSHEET

INSTRUCTIONS:

You are a member of a space crew originally scheduled to rendezvous with a mother ship on the lighted surface of the moon. Due to mechanical difficulties, however, your ship was forced to land at a spot some 200 miles from the rendezvous point. During landing, much of the equipment aboard was damaged, and, since survival depends on reaching the mother ship, the most critical items available must be chosen for the 200-mile trip. Below are listed the items left intact and undamaged after landing. Your task is to rank order them in terms of their importance to your crew in allowing them to reach the rendezvous point. Place the number 1 by the most important item, the number 2 by the second most important, and so on, to the least important. You have 15 minutes to complete this phase of the exercise.

_____Box of matches

_____Food concentrate

_____50 feet of nylon rope

_____Parachute silk

_____Portable heating unit

_____Two .45 calibre pistols

_____Two 100-lb. tanks of oxygen

_____Lunar map

_____Life raft

_____5 gallons of water

_____Signal flares

_____First aid kit

_____Solar-powered FM receiver-transmitter

NASA EXERCISE INDIVIDUAL WORKSHEET

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_____Parachute silk

_____Portable heating unit

_____Two .45 calibre pistols

_____Two 100-lb. tanks of oxygen

_____Lunar map

_____Life raft

_____5 gallons of water

_____Signal flares

_____First aid kit

_____Solar-powered FM receiver-transmitter

NASA EXERCISE ANSWER SHEET

RATIONALE:	CORRECT NUMBER:	
No oxygen	14	Box of matches
Can live for some time without food	4	Food concentrate
For travel over rough terrain	6	50 feet of nylon rope
Carrying	8	Parachute silk
Lighted side of moon is hot	13	Portable heating unit
Some use for propulsion	11	Two .45 calibre pistols
No air on moon	1	Two 100-lb tanks of oxygen
Needed for navigation	3	Lunar map
Some value for shelter or carrying	9	Life raft
You can't live long without this	2	5 gallons of water
No oxygen	10	Signal flares
First aid kit might be needed but needles are useless	7	First aid kit containing injection needles
Communication	5	Solar-powered F M receiver-transmitter

Title

Power chairs

Goals

To understand participants' evaluation of their role in a group.

To give and receive feedback on one's style of influencing a group.

Time

45 to 60 minutes

Handouts

Chairs in a straight line, side by side.
Same number of chairs as participants.

Group Size

6 or more

TIME	CONTENT	METHOD
10 minutes	Trainer asks group members to select a chair in the row which best represents his position of power and influence on the group. The chair to the extreme left represents a position of highest influence and power while the chair at the extreme right represents lowest influence and lowest power. Trainer checks to see if everyone is where he thinks he belongs.	trainer gives directions
15 minutes to 60 minutes	Group forms circle with chairs and participants explains their seat selection.	group discussion

Process Notes

A group has to have met for some time in order for this exercise to be worthwhile. Trainer can allow the discussion

about seat selection to begin while participants are lined up in chairs but he should then move them back to a circle to permit more face-to-face discussion and feedback. Careful now, this is approaching sensitivity training. Be sure you can handle it.

Title

Group Member Roles

Goals

To study various types of roles in relation to group goals.

To demonstrate that leadership in a small group consists of several functions that should be shared among members.

Time

3 hours

Handouts

Film: Twelve Angry Men, 16 mm. projector, movie screen, an extra bulb for the projector, an adapter for the projector cord, sheets of paper with a diagram of the seating arrangement for the jury.

Group Size

6 or more

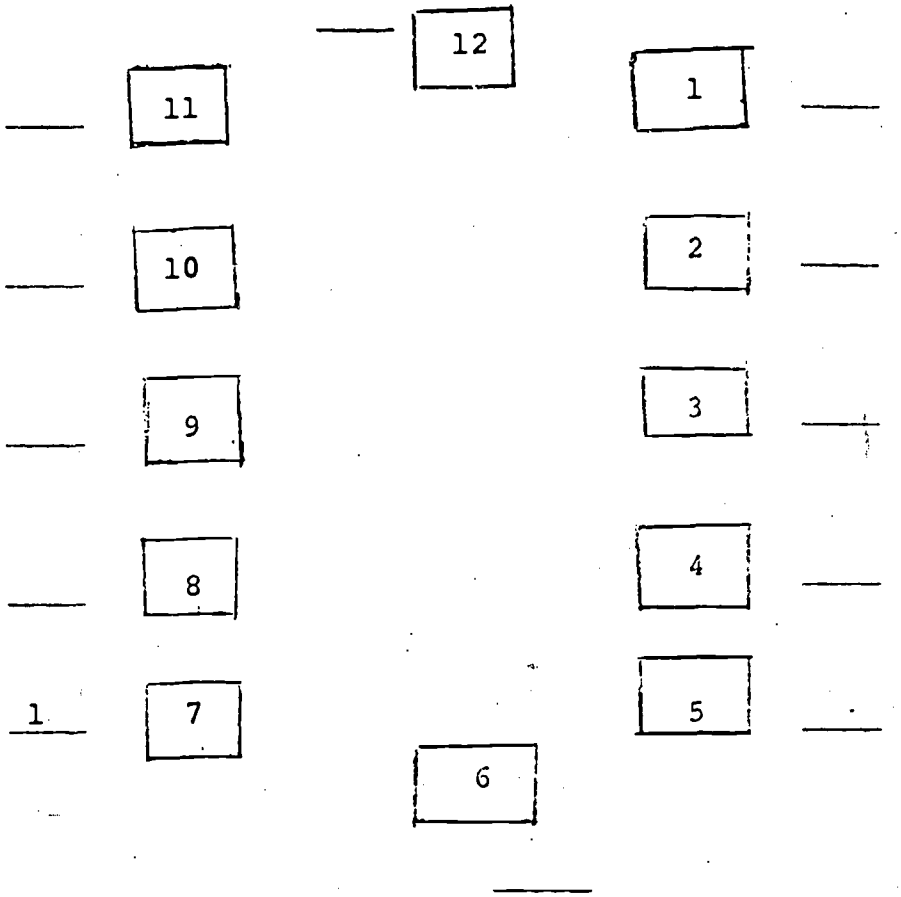
TIME	CONTENT	METHOD
5 minutes	Trainer introduces the film and directs the viewers attention to the way the jury functions as a group. Film starts.	Brief introduction by the trainer
Approximately 20 minutes (after the first vote)	Film is stopped and participants are directed to complete the blank jury diagram sheet according to the order in which the 11 other jurors might change their vote from "guilty" to "not guilty."	Diagram sheets are distributed Participants work alone
60 minutes	Trainer asks participants to discuss their analysis of the jury voting.	Total group sharing

Process Notes

For this or any other film it is essential that the trainer be thoroughly familiar with it before the exercise. In discussion of this particular film participants should focus on the group

dynamics of the jury and observe its impact on the roles of the individual jury members. Order in which votes change is less important than an understanding of the roles played by individual jury members.

JURY VOTING ANALYSIS



Title

Cooperation Exercise

Goals

To analyze certain aspects of cooperation in solving a group problem.

To enable participants to recognize some of their own behavior in a group problem solving process.

Time

30-90 minutes, depending on group size and interest.

Handouts

5 envelopes with parts of broken squares for the 5 participants (See pattern for the 5 squares)

Group Size

6 or 12
At least 5 participants sit around a table and one other participant stands by the seated group and observes the group's activity.

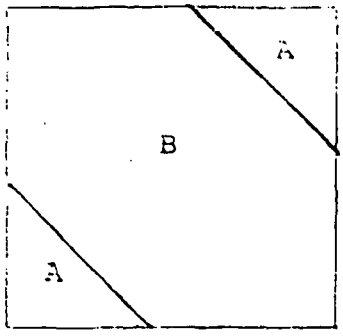
TIME	CONTENT	METHOD
10 minutes	Trainer distributes the 5 envelopes to the participants seated at the table, one envelope to each participant.	Trainer reads the instructions for the exercise
15 minutes	The group work on the exercise. Trainer reads: "On the table are five envelopes, each of which contains pieces of cardboard for forming squares." When the trainer gives the sign to begin, the task of the group will be to form 5 squares of equal size. The task will not be complete until each individual has before him a perfect square of the same size as that held by others. During the exercise you: 1) May not speak. 2) May not ask another member for a card or	The work group with the instructions in mind

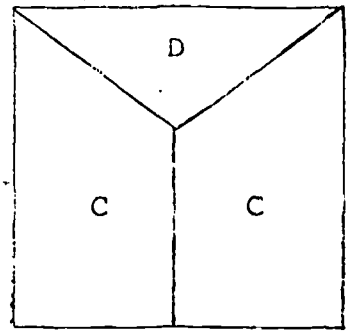
TIME	CONTENT	METHOD
	in any way signal that another person should give him a card. 3) May give cards to other members. Trainer asks if the instructions are clear. Trainer has group begin working.	
30-45 minutes	An ensuing discussion of the exercise may cover the following points: 1) Each individual should understand the total problem. 2) Each individual should understand how he can contribute toward solving the problem. 3) Each participant should be aware of the potential contributions of other individuals. 4) There is a need to recognize the problems of other individuals in order to aid them in making their maximum contribution. 5) The observer makes comments on the behavior during the exercise.	lecturette

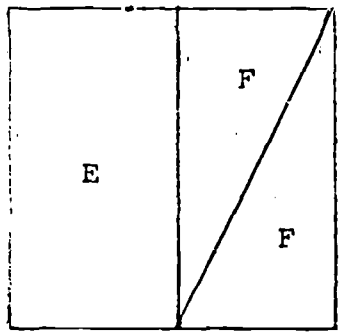
Process Notes

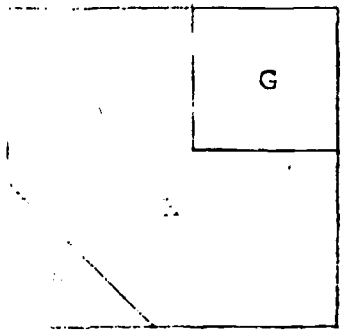
The group's ideas might be listed on newsprint to serve as a discussion guide. The trainer will encourage the groups to discuss their experiences with the focus on feelings rather than merely relating experiences and general observations.

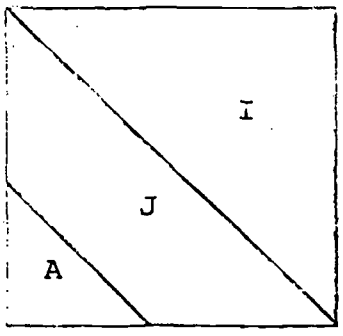
PATTERNS FOR THE 5 SQUARES











Envelope A has pieces i, h, e
" B " " a, a, a, c
" C " " a, j
" D " " d, f
" E " " g, b, f, c

THE DEEP END: FOR YOUR CONTINUED READING

American Management Association, Making the Most of Training Opportunities, New York: AMA, 1965.

A systems approach to training for business. Includes sections on audio-visuals, techniques, and program design.

Dolmatch, Theodore, Revolution in Training: Programmed Instruction in Industry, New York: American Management Association, 1962.

A collection of readings, mainly accounts of applications of programmed instruction in different organizations with implications for further use in training programs.

Graham, Robert G. and Gray, Clifford F., Business Games Handbook, New York: American Management Association, 1969.

Part I includes readings on the development and theory of business games to teach decision making. Part II contains an exhaustive compilation of existing business games, each one being abstracted and listed with sources.

Kolb, David et. al., Organizational Psychology, an Experiential Approach, Englewood Cliffs, N. J.: Prentice-Hall, Inc., 1971.

Contains materials and exercises used for training MBA's at the MIT Sloan School of Management. Subjects include learning and problem solving, decision making, motivation, etc. Complete materials and trainer's instructions included.

Maier, Norman R. et. al., Supervisory and Executive Development: A Manual for Role Playing, New York: John Wiley & Sons, 1964.

For use in training programs, this book includes materials and explanations necessary for using cases in supervisory development programs. Includes cases, backup material, and instructors' information.

Ofiesh, Gabriel D., Programmed Instruction, New York: American Management Association, 1965.

An in-depth work on programmed instruction and learning. Valuable prime source for information on the development and use of programmed instruction materials.

Pfeiffer, William J. and Jones, John E., A Handbook of Structured Experiences for Human Relations Training, Iowa City: University Associates Press, 1970. [4 volumes].

Includes approximately 150 exercises, experiments, games, etc. for use in training. Each one with materials and trainer's instructions.

Sattler, William M. and Miller, N. (eds.), Discussion and Conference, Englewood Cliffs, N. J.: Prentice-Hall, 1968.
In-depth work on the use of discussion and conference techniques. Sections 3 and 4 are particularly related to design questions; includes sections on discussion leadership and design, case problem discussions, incident process and role playing.

SECTION IV

EVALUATION

SECTION IV

EVALUATION

Evaluation is important for everyone involved--for the trainer, the learners, and the sponsors. They all want to know what has been accomplished in a training program. Yet, evaluation is most popular when it is applied to someone else. That's because it is generally negative, it is often personally focused, and it tends to be judgmental. All too often evaluations concentrate on failures rather than accomplishments.

Recognizing these difficulties, we can try to eliminate them, so far as possible, in evaluation of our training activities. We will try to use evaluation simply as another learning tool, a tool that can be dangerous and must be handled with care but a tool that is nonetheless useful.

Trainers separate evaluations into major categories:

1. Evaluation of the achievements of learning events (training evaluation).

2. Evaluation of the impact of the learning event on the learner and others over a period of time (impact evaluation).

Evaluating the Learning Event

There are four reasons to evaluate training. They are:

1. Determine the extent to which the Definitive Learning Objectives have been accomplished during the training. If the DLO's of the training design are good ones, this type of evaluation is easy.

Let's go back to the beginning where we agreed to some DLO's for training Chico's Bridge student volunteers for their hotline project. One DLO was:

> At the end of training, volunteers will be able to list nine of the ten clinics in Chico.

So we have reached the time for evaluation. We have an easily measured objective. Can the learners list nine of the 10 clinics? Ask each one to make a list and see. That's all there is to this evaluation. Naturally all the DLO's are subject to evaluation, and some are more difficult. For example, if one objective is to have volunteers demonstrate skill in counseling a high-school dropout, this cannot be done by making a list. You will have to set up some sort of role-plays or simulation that you can observe and evaluate.

In every instance, the evaluation is based on a demonstration of accomplishment of the Definitive Learning Objectives.

2. Determining whether the learner can correlate what he has learned with his own job situation is the next step in training evaluation. This is more difficult, even though you are only evaluating the learner's immediate, here and now, ability to transfer what he has learned from a training environment to a work environment.

This can be done by asking the learner to make the transition by asking him questions such as:

°List three ways to use what you have learned here when doing your volunteer work.

°Describe your volunteer activity and list two ways this training has made it easier.

°Think of all the things you do on your volunteer job and list two ways this training has made it possible for you to do them better.

These questions are open-ended. They require an essay type response (oral or written), which requires some degree of judgmental evaluation by the trainer.

Be careful in phrasing these questions. Do not probe into the learners' feelings about training. Here you are only interested in the ability of the learner to make the transition from a learning experience to an actual situation.

3. Feelings of the learner are the next step in evaluation. Experienced trainers seldom need any formal evaluation of feelings. Positive and negative feelings of the group or part of the group come through clear and loud during the training sessions. And they are not consistent. There will be times when no one is happy. Fortunately the reverse is also true. You are not to be too concerned over the peaks and valleys. You are interested in the overall level of feeling with the added hope that it ends high.

There are, of course, some testing tools for evaluating feelings.

°Rate your level of satisfaction with the group. If it is low, circle number 1. If it is high, circle 5.

1 2 3 4 5

°Which word best describes your reaction to this group:

Positive Indifferent Negative

4. Finally, how does the group evaluate the trainer's performance. Now you are asking the learners to evaluate you. The purpose is to help you learn.

How do you get this feedback? Once again, orally or in writing, ask questions like:

- What part of the content was most impressive to you? The least impressive?
- How would you reorganize the training if you believe it's necessary to do so?
- What specific mannerisms, behaviors, and methods of presentation are the trainer's greatest strengths?
- To what extent did the pace of the training meet your needs? Does the presentation seem coherent? If not, what would you do to make it so?
- What's your most positive impression of the trainer in terms of behavior? What's your least positive impression?

Impact Evaluation

Up to this point we have been talking about evaluation of the training event. This type of evaluation is done during or at the end of training. It should show the change in knowledge, skill, or feelings brought about by the training as measured at the time the evaluation is made.

This is as far as most trainers go with evaluation, and many feel it is as far as they should go.

There is, however, a second type of evaluation, impact evaluation. This attempts to evaluate the effects of learning at some later date and involves not only the learners but the communities with whom they have worked.

Let's go back to the simple example of Chico's Bridge and the hotline training. Impact evaluation would attempt to determine the effects of the training six months or a year later. Does the learner still know and use the clinics for referral? In addition, what about the clients? What good have they received as a result of what was learned in the training program?

To go even further, what about four years later? The volunteer is out of school. What was the impact of the training on this learner in making him a better human being or a more effective member of society?

This sounds difficult--and it is.

Impact evaluation can go on forever. "For want of a nail, a shoe was lost . . ." It is expensive and time consuming, and it demands the application of many technical disciplines and special tools like mathematical models and computers.

However, it is possible to collect some data related to impact evaluation and by making assumptions and applying judgment arrive at reasonable if unverifiable conclusions.

If you want to, you might try a simple impact evaluation effort. But do not expect to reach any great conclusions based on results. There are too many outside factors involved.

Send out a questionnaire three, six and nine months after training. Ask questions like:

- List specific instances in which training provided by _____ at _____ University benefited you in your volunteer work.
- If you have been unable to apply the training to your volunteer activities, list three or four reasons why.
- List volunteer job procedures you have consciously altered as a direct result of your training.
- Note what skills you now use (if any) which were developed by your training.
- Describe your present attitude about the value of the training.
- What didn't you learn that you found you needed?

Evaluation for Others

We have assumed that evaluation, whether training evaluation or impact evaluation, is for the benefit of the learner or the trainer. This is not always true. Evaluation may be required by the university administration or by the agency or foundation financing the volunteer program or the training. Someone is paying, and that someone usually wants to know what he is getting for his money.

From what has been said about evaluation, it should not be difficult for you as a trainer to prepare an evaluation report on the training itself. Simply state the Definitive Learning Objectives and then state the extent to which they were achieved. Try to avoid any obligation to prepare an impact evaluation report.

THE DEEP END: FOR YOUR CONTINUED READING

Mager, Robert F. and Pipe, Peter, Analyzing Performance Problems, Belmont, Calif.: Fearon Publishers, 1970.

This book is about problems that arise because someone isn't doing what he is supposed to be doing or what you would like him to be doing. It describes a series of questions to ask when faced with this sort of "performance problem" and offers a quick reference checklist to help you determine what sort of solution is most likely to work.

Margolis, Fredric H., Training by Objectives: A Participant Oriented Approach, Cambridge: McBer and Co. (available from F M Associates, Ltd., 1725 K Street, N. W., Washington, D. C. 20006), 1970.

This book contains a chapter on impact evaluation if you want to go further into this. It does point out that impact evaluations are seldom the responsibility of trainers.

APPENDIX I

WHAT IS TRAINING?

WHAT IS TRAINING?

"What is training?" This is very difficult to answer to everyones' satisfaction. Horse trainers and people trainers differ in both their views and methods. No one can say, "I do it right! Unless others do as I do, they don't train." No one has yet discovered the elusive, universal IT that is training.

A Definition

If you must have a definition, you can look in the dictionary, but precisely defining "train" and "training" is not very helpful for a trainer. What counts is the action taken.

One of the concepts "training" communicates is a sense of movement and process. Training is a kenetic rather than a static process. Training, like the word "growing", suggests a process of change. Also, the word implies goals toward which the process moves.

People are trained to become proficient at doing something--something that can be measured. Training is not a random, omni-directional exercise. It is a rational, systematic process of planned change by which marginally proficient people become more proficient in relation to their specific, previously established goals.

Years ago, only military, athletic, and medical professions used the work "train." Everyone else used "education" to describe similar processes. As a result, "training" took on technical, even spartan, connotations. No one thought of using the word for broader learning experiences until the advent of sensitivity training in the late 1940's and early 1950's. Sensitivity training was so far removed in form from structured educational events that "education" just didn't seem right to describe it. No word was. But since participants were trained to be more sensitive to their own (and others') interpersonal communications, the process became known as sensitivity training and later, T-grouping (for Training group), for lack of a better term. In any event, an addition was made to the American vocabulary.

How Did We Get Here?

There are a number of channels through which the behavioral sciences became a part of the American educational scene. Virtually none of the participatory techniques and methods now associated with training are new. Simulation games were known 75 years ago; role playing is as old as drama itself; encounter is an everyday occurrence (particularly in New York taxicabs); and dialogue learning is an adaptation of the Socratic method. It's just that these methods weren't often used in educational circles. The ideas of Dewey and others bridged the gap between content centered formal

schooling and experienced-based learning.

"Experience is a dear school, but fools will learn in no other." This old proverb suggests that formal, organized schooling can substitute for experience. By means of schooling, persons are supposed to become competent without the pains of learning everything from personal experience. There is some sense to that. Who wants to reinvent the wheel? Would you want the interested beginner to learn medicine by experimenting on you? Unfortunately, as formal education became a part of our way of life, experience got pushed into a back seat. Life and living increasingly were regarded as imperfect learning tools--incomplete, random, and unscientific. Consider the emphasis currently placed upon educational credentials. Experience, as the proverb says, is for fools. The wise go to school.

The schooling model works only up to a point. Before humans have much experience or have the ability to put experience into unified shapes, schooling serves its intended purpose well. However, by age ten (at least), people accumulate impressive funds of experience to draw upon for purposes of learning. This does not mean that formal education should stop at the fourth or fifth grade; it does mean that from there, much more can be learned if the learner can also become involved in experiential learning. More and more personal experience is accumulated each year, and as a result, adults prefer learning environments in which they can utilize their experiences to solve problems and continue to grow. The genius of experiential education is that experience is first generated by participants themselves and only then is it synthesized. The learning outcomes are relevant, congruent with reality and experience, owned by the learners, and often profound. Learners discover a whole new process of inquiry and growth.

Experiential learning naturally became the focus of a great deal of attention because it was usually exciting and always involving. There were a good many advocates who believed it to be a panacea for all ills, public and private, regardless of origin. Gradually, of course, distinctions were made. It became increasingly and painfully clear that sensitivity training, for example, while useful in some areas of interpersonal relations, didn't even touch other learning needs.

However, we all agree that adults possess a wealth of experience to offer as resources to others. Learners can become active copartners in their own learning. They share, shape, guide and synthesize it. For many learners, this adult education is a new experience. They are accustomed to having teachers tell them what is important and what isn't. You can well imagine the elation of those who found they could learn in groups without being told what to learn by the teacher.

There are a great many ways to experience quality adult education; you will invent some new ways yourself. That's what training is all about. But had it not been for John Dewey, Kurt Lewin, Ken Benne, Lee Bradford, Malcolm Knowles, and several others, we might still be thrashing about trying to find means by which the principles of adult education could be effectively and efficiently applied.

Adult Learning Characteristics

What are the characteristics of the adult learner that distinguish him and make adult education important? We've already mentioned a few. Now let's elaborate.

First is the adult self-image. Adults don't perceive themselves as dependent children. Quite the contrary. Most adolescents see themselves as independent; later, as adults, as interdependent. Adults see themselves as capable of maintaining control of their own lives and making rational decisions for themselves. If adults desire a dependent relationship (and some do), it is a matter of choice rather than circumstances.

Second, adults are experienced. Who doesn't learn an incredible amount of information in the first 18 years of life? Moreover, adults define themselves in terms of their experiences. Their histories are exceedingly valuable to themselves and others. Children don't have as much experience and are less likely to knowingly and intentionally serve as resources to others.

Characteristic number three: Problems are more real to adults than ideas are. Most people can't afford to keep solutions at bay until they learn more principles. On-going demands and responsibilties prod adults into an orientation to the present and its problems rather than to the past or even to the future. Children are immersed in a delayed application educational pattern: "Someday you'll need it." Adults won't put up with this.

Both children and adults experience times when they're ready to learn. However, for children, these moments center on motor development and psychological maturation. Adults "teachable moments" focus on role functions: home building, establishing a marriage and a family, choosing a vocation or interest. The characteristic of the adult is that he tends to be outer-directed at his teachable moments and, as a consequence, almost inevitably involved with others. Unlike a child, the adults' major educational receptivity is not so concerned with growing up as with taking responsible roles in the world.

Educational Implications

Each characteristic suggests educational implications. For example, since adults perceive themselves as interdependent, it is unwise

to build educational curricula for them that lack participant input and planning. And since adults value their adult status, it is equally unwise to place adults in restricted environments (rigid seating, raise your hand if you know the answer, ask permission if you wish to leave the room).

The role of the teacher is different. For children, the teacher is the chief resource. For adults, the teacher is only one of many resources. The teacher's job shifts from that of content person to that of learning facilitator. Adults require learning situations that conform to their histories rather than to abstract, ideal condicitons. Finally, adults appreciate experiential, participatory learning; it is a way for them to introduce personal experience as a resource.

The problem orientation of adults suggests curricula that are parctical and immediately applicable back home. "How to do it" is usually more significant than "why ought (or ought not) to do it." Take this manual for example. You don't need a collection of essays about training. You want something that helps you get cracking.

As far as readiness to learn is concerned, the trainer must be careful to select exercises, examples, and structures, not to mention content, with which the group can identify. This is a particularly crucial aspect in mult-racial and cross-cultural training. Don't try to pawn something like middle class values off on racilally mixed groups.

The Theory in a Nutshell

To put it all together, adults don't behave like children, and cannot be expected to learn like children. They possess experience, insights, and skills that are unique and valuable learning resources. Because of their immediate responsibilities, adults are problem oriented and don't relish delayed learning outcomes. Finally, experienced-based learning is more congenial to adults because it permits them to share their own resources and recognize the learning experience as relevant. It probably seems incredibly simple to you. You're right. But the world being what it is, educational systems don't always conform to what anyone can plainly see. The reason is obvious. The power of the traditional schooling culture is great. Most of us have never known anything other than passive learning in schools. Now, we're asking ourselves to reverse that trend and become active learners. Obvious? Yes. Simple? No. As rational as the principles of adult education are, they are precisely opposite to the operative principles of formal schooling. You'll meet this difference over and over again; in design, in technique selection, in evaluation, everywhere. For the present accept an exhortation: You are engaging yourself in a radical departure from the norms of formal education in a western culture. It isn't

simply your knowledge or skills that must change. Your gut, too, must change, and that change will not come overnight.

The following analogy may prove useful to illustrate the difference between formal schooling and training: In formal schooling systems, the teacher is to students as a virtuoso violinist is to an audience; the audience is passive. In training, the trainer is to participants as a symphony conductor is to members of the orchestra. The trainer and the participants are all active. Between the two forms there is a gulf measurable only in light years.

Open-Ended Training

A major complaint against some types of experiential learning is that there are no apparent results. These concerns are perfectly legitimate. Sensitivity and encounter training, for example, are educational smorgasbords. They are open-ended, and few definitive objectives are involved. The process common to training of this type is an exploration of an unpredictable dynamic involving the interaction of a particular mix of people. There is no way to predict with certainty the insights and skills trainees will get. Some people go through a T-Group and never learn a thing. Others learn an incredible amount--and these two learners can be sitting next to one another!

Close-Ended Training

Outcomes for other kinds of training are much more predictable. There is no question as to the outcome of typing training. Either a student can type X words per minute, or he can't. The specific objectives are clear and predictable. Moreover, all participants can be expected to possess roughly the same degree of skill at the end. This type of training is close-ended and objective centered. Most training is.

It is necessary to recognize the kind of training one wishes to undertake so as not to promise one product and deliver another. For you, most of your work will be objective focused. It will lead toward a measurable increase of competence and skill. Volunteer programs do, of course, touch feelings, values and attitudes--areas open-ended training explores rather well, but that is not the principal area of concern of this manual. It has been designed to help you train student volunteers in skill areas such as tutoring, counseling, organizing, and managing. Therefore, your designs will be structured. You'll need to know how to design around specific objectives, and very little aimless rapping will occur in your training events. The point is, there are various species of training, and it is best not to confuse them.

THE DEEP END: FOR YOUR CONTINUED READING

Dewey, John, Democracy and Education, New York: The Macmillan Co., 1916.
This is John Dewey's first important work on education and a statement of his position and interest in wedding theory to practice in the educational field.

_____, Experience and Education, New York: The Macmillan Co., 1938.
A restatement of Dewey's position a decade after publication of Democracy and Education. Shorter than the first book but articulate and readable.

Freire, Paulo, Pedagogy of the Oppressed, New York: Herder and Herder, 1968.
Freire is a philosopher and describes how the poor and disenfranchised people of Brazil are controlled by the majority culture there and how they might be released from that bondage through innovative adult education methods. A little difficult to read but worth the effort.

Knowles, Malcolm S., The Modern Practice of Adult Education, New York: Association Press, 1970.
It is by far the clearest and most comprehensive exposition of adult education available.

APPENDIX II

WHO IS A TRAINER?

WHO IS A TRAINER?

Two years ago, we received a letter from a psychology professor who had read about a program for training of trainers. He asked what a trainer was. Having heard of animal trainers and the like, he claimed to be a bit mystified by a trainer of trainers. His confusion is understandable.

What is a trainer? Or better still, who is a trainer? Obviously, a trainer is one who trains. Anyone can figure that out without too much trouble and be no better off for having done so. What one really needs is an examination of the skills, values, and backgrounds that qualify a person as a trainer.

Not a Teacher

A trainer is a facilitator of group learning for adults. He is not a teacher in the accepted meaning of the word because his strength doesn't lie in a thorough grasp of some particular content area. The trainer's expertise rests upon his ability to design and manage a context in which participants and expert resource persons (including the trainer and selected others) can utilize their own needs, goals, and abilities for the purpose of learning. Trainers are process experts. A trainer is a conductor, not a piano teacher. It is a trainer's task to orchestrate so that the result is harmonious and of greater variety and magnitude than any one person could produce alone. There is also a synergistic element to training; when a trainer does his work well, the end product for the group is greater than all of the inputs. A trainer possesses the skill to help others release their own strength and the artistic sense to do it in such a way that the release is in tune with, and complementary to, what's going on in the whole training environment.

Science of Training

Training is applied behavioral science. Behavioral scientists explore the whys and wherefores of people behavior; how people learn, why they react as they do. Trainers very often start with group dynamics, which is a jargon term referring to the forces and impulses that make and break groups. Quite apart from personal feelings and individual personalities, there are identifiable group characteristics, and trainers need to know what they are.

Trainers must also know something about individual behavior and cultivate an objectivity that permits clear views of how people behave. The easiest way to get a start in this area is via a beginning psychology course, though psychology is by no means the sole source of the information. Some of the most gifted trainers in the field have never attended a psychology course. Their knowledge came about in other ways; through sociology, pastoral counseling, experience, or self-instruction. They got the information somewhere and are in command of it.

Self-knowledge is important to a trainer. It's very tempting, and very easy, to use a group of people to meet one's own needs. A learning group is formed to create growth for everyone. Good trainers value time committed by others and don't steal group time for themselves. Groups organize effective resistance to manipulation of that sort. Initially, one can milk some adulation or attention, or hostility out of a group. Unfortunately, the group suffers because its focus is on the trainer instead of group tasks. These situations often occur when neophyte trainers work their own agendas for lack of understanding of any other agendas. They grasp what seems real to them and end by pursuing their own concerns. Therefore, self-knowledge is a must. Just how one goes about getting it is another matter. The psychoanalytic route is long, expensive, and a massive over-kill for your purposes.

T-groups and personal growth groups serve the purpose admirably but eventually become marginally effective as one becomes "group wise" and clever at avoiding adverse confrontations and feedback. Co-training with a senior trainer provides another means whereby self-awareness in training can be increased, and, finally, functioning as a lead trainer is the most effective way of all, especially if one has developed ears to hear about himself.

Another element of training is technical in nature. Training experts are technically proficient in providing learning experiences, working them well, intervening appropriately, speaking clearly and concisely, giving good directions, and managing conflict. These are acquired "stand-up" skills, or what a trainer does when he's in front of a group.

Designing is another type of skill. Designs make or break training events. A poor design is an albatross on the neck of a good trainer and will finish him off despite his skill. On the other hand, a good design will go a long way towards creation of the synergism we mentioned. Designing is a skill trainers must have--a core skill. A trainer without a design is not much more effective than an innocent bystander.

With appropriate knowledge and skills, one is scientifically equipped to undertake training.

There is also an artistic dimension to training. It triggers the mechanical-scientific aspects and causes them to come alive.

Chief among the artistic requirements is a genuine love of people. By love we don't mean erotic or sentimental love, though both are legitimate ways of caring. We mean love that takes humans seriously, optimistically, and respectfully. Human beings are the world's most complex animals and are occasionally difficult to deal with. Unless you are willing to encounter humanity with a large measure of care, you shouldn't opt for training.

Training is a process of creating environments wherein people can systematically come to grips with their own reality and learn from it. There is, quite naturally, a good deal of rough and tumble associated with training and some pain. Trainers are prepared to face these phenomena matter of factly but emphatically--without thoughts, words, or actions conveying the "You ought to ..." message. A trainer's love for people is manifest by his trust in them--trust in their intelligence, trust in their capacity to deal with reality, trust in their generosity and grace, and trust in their openness to adventure. Training events that lack the substance of responsible human love are plastic, mawkish, and incredibly dull.

Imitation is an age-old learning device. Trainers continuously model behavior. If they are late, others may be late. If they are punishing, others may be. The relative effectiveness of learning by imitation is unknown but probably of greater significance than we suppose. There isn't anyone who doesn't vividly remember an important adult model--teacher, parent, officer, boss, or someone whose behavior merited attention and imitation. It's not necessary, of course, to conform to a pre-ordained, external moral standard or try to act out someone else's "model trainer" role to become a decent trainer. You can be yourself. The real issues at stake are consistency and congruence. If you say one thing but act to the contrary, you send mixed signals and are incongruent. The participant is much more likely to imitate your actions than your words. There are no rules to guide you in this area. Simply try to conduct yourself in ways that don't violate the rationale of the principles you're trying to share--and get feedback to help you.

We all have favorite behaviors which are the first we bring out for exhibition but which may be grossly incongruent with the model of adult education we've been talking about. For example, someone who speaks well may continue to do so in a training group; on...and on... and on... and on. Perhaps participants are even raptly attentive, but the result is the same as if they had gone to a lecture because active trainee participation

doesn't take place and the adult education model is violated. And yet, the trainer is doing his genuine best. His best is incongruent, however, and unless he receives feedback, he will never know of his failure.

Don't take responsibility for someone else's learning. That's not to say you don't care one way or another whether trainees learn. You do care. But after you've done your best, the learner will interpret and assimilate what he can in the manner most appropriate for him. You've got to trust him to do that. Otherwise, you put him down. Paulo Freire, author of Pedagogy of the Oppressed, describes the colonial approach to education in this way: ". . . the overseer not only determines what is taught but how it is taught and even how it is learned."

Avoid that model. Occasionally, trainees will try to box you into taking responsibility for them. They will ask you to act like a teacher. They've been used to being pretty passive, and they find more demanding approaches different and unsettling. Don't let them do it.

Summary

A trainer's job is to orchestrate learning events. He is technically well trained in the behavioral sciences and the use of learning techniques. Like any good artist, he makes his job look easy. Of course, it is not. A trainer is a lover of mankind, a well qualified lover who is able to create contexts in which others can learn. Most of all, trainers do not take responsibility for the learning of their trainees. Instead, they constantly encourage trainees to take responsibility for themselves and become active self-directed learners.

THE DEEP END: FOR YOUR CONTINUED READING

Dyer, William G. (ed.), Modern Theory and Method in Group Training, New York: Van Nostrand Reinhold Company, 1972.
This whole book is about how one becomes a trainer, and why. The emphasis is on the T-Group trainer, and the basic issues are the same for the objective-centered trainer.

Knowles, Malcolm S, The Modern Practice of Adult Education, New York: Association Press, 1970.
This book is listed at the end of the first section. For this section, read pp. 15-36.

Miles, Matthew B., Learning to Work in Groups, New York: Teachers College Press, 1959.
Read pp. 204-223 to find out about trainers. Miles' book is a gem and can't be exhausted.

Nylen, Donald et. al., Handbook of Staff Development and Human Relations Training, Washington, D. C.: National Training Laboratory, 1967.
Read pp. 267-279 for trainer role information. Note, however, that the focus is on the T-Group trainer. The basic value assumptions apply to all training situations.

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This whole book is about how one becomes a trainer, and why. Again, as in Donald Nylen's book, the emphasis is on the T-Group trainer. Still, the basic issues are the same for the objective-centered trainer.

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