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Adult Learning Services: Adult Life Cycle Training Workshops and Manuals: Citizen Involvement Training Project; Hispanic Extension Program; Nashville Hospitality Training Program; Peer Counseling Program; Wisconsins Energy Extension, Service

ABSTRACT

Seven 1979 innovative programs in continuing education are described which won awards from the American College, Testing Program and the National University Extension Association. Awards were granted according to programs transferability. innovativeness, workability, and impact in one of four categories: instructional programs, student services, and counseling, administration/organization, and open. The programs contained in the report are the (1) Hispanic Extension Program, (2) Peer Counseling Program, (3) Adult Learning Services, (4) Wisconsin's Energy Extension Service, (5) Citizen Involvement Training Project, (6) Adult Life Cycle Training Workshops and Manuals, and (7) Washville HOST Hespitality Training Program. Each program is presented according to the following format: program name, principal person responsible for entry, person(s) or institution to whom award would te made, source(s) of funding, cost of program, number of. particirants in program, objectives of the program, and a narrative describing the program. (CSS)

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Other publications in the NUEA-ACT Series on Continuing Education

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National University Extension Association and The American College
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National University Extension Association and The American College
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TABLE OF CONTENTS

| Category 1Instructional Pro | ograms | | | | | • |
|---|--|----------|-------------|---|-----------|---------------------------------------|
| Hispanic Extension Program Elmhurst College | | | | ; • • • • • • • • • • • • • • • • • • • | ••••• | |
| Center for Special Programs Michael Feldman | . ^ | | , | . 1 | i e | , , , , , , , , , , , , , , , , , , , |
| Category 2Student Services | and Counsel | ing | | • | - | |
| Peer Counseling Program University College of Syracus University College Nancy C. Gelling | se Universit | у | • | ••••• | ****** | |
| Adult Learning Services (hono Indiana University School of Continuing Studies Nancy C. Seltz | orable menti | on) | ••••• | •••••• | | 17 |
| Category 3Administration/Or | ganization | * | | , , | | |
| Wisconsin's Energy Extension University of Wisconsin Extension Division William R. Bernhagen | Service: A | Study | in Mat | rix Org | anizatior | 29 |
| Category 4Open | ************************************** | | ı | • | • | |
| Citizen Involvement Training I University of Massachusetts/Ar Division of Continuing Educat Kevin Grennan and Stan Rosenbe | mherst ion | | • • • • • • | ······································ | | 41 |

| Adult Life Cycle Training Workshops and Manuals for Kansas Adam and Counselors (honorable mention) | dult Educators | ; 53 |
|--|----------------|---------|
| University of Kansas | 4. | |
| Adult Life Resource Center | | |
| Division of Continuing Education | | |
| Vivian Rogers McCoy, M. Colleen Ryan, James Lichtenberg | · · | |
| Nashville HOST Hospitality Training Program (honorable mention | on) | 65 |
| The University of Tennessee at Nashville | | : |
| Division of Public Service | | |
| C. Edwin LeJeune and John M. Crothers | • | • |

FOREWORD

In 1971, the American College Testing Program and the National University Extension Association joined to initiate the ACT-NUEA Innovative Awards in Continuing Education program. This book is a compilation of the award-winning entries submitted to that program in 1978, and honored in May 1979 at the NUEA annual banquet held during the annual meeting of the Association.

The ACT-NUEA awards are designed to honor the faculty and staff of NUEA member institutions who are making innovative contributions that have nationwide, regional, statewide, or institutional application for the improvement of continuing education, and to disseminate information about these contributions to other professionals in the field.

There are four separate award categories in the program. Winners are chosen from some or all of the categories, depending on the merit of the entries.

The award categories are:

- 1. Instructional Programs
- 2: Student Services and Counseling
- 3. Administration/Organization
- 4. Open (may include combinations of above categories)

The ACT-NUEA Awards Committee used four criteria in reviewing this year's applications: transferability, innovative or different, workability, and impact. We were concerned with how transferable a program was to other settings and institutions. By innovative or different, we looked at: programs new to the field of continuing education, programs which affected the institution's role in extension and continuing education, and originality in breaking new ground in existing curricula areas. For the criterion of workability, the Committee focused on the adequacy of the planning, implementation, and evaluation activities of the program. We were also concerned with impact of the programs and frequently had to re-examine each entry to ascertain its impact. The Committee rated each entry on all the criteria and assessed an overall ranking.

The Committee was impressed with the variety of entries submitted. We feel this is a direct reflection of institutional attempts to meet the needs of adult learners.

Michael C. Alin, Smithsonian Institution, Chairperson Lenore Saltman, The American University Ronald H. Miller, The College Board

Editor's note: Some exhibits and appendices have been omitted from this compilation. Additional information about an entry may be obtained by contacting the principal person responsible.

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Program Name: Hispanic Extension Program

Name of Principal Person(s) Responsible for Entry: Dr. Michael Feldman

Person(s) or Institution to Whom Award Would be Made: Elmhurst College Center For Special Programs

Source(s) of Funding: The Frederick E. and Ida H. Hummel Foundation (start up costs)
Illinois State Scholarship Commission

Basic Education Opportunity Grants

Cost of Program: \$237,000

Number of Participants in Program: 260.

Objectives of Program

- 1. To enable Hispanic adult students with limited English proficiency to pursue and complete their education at the college level.
- 2. To enable Program students to gain proficiency in English language skills upon graduation.
- 3. To ensule Program students to secure the values of both liberal education.
- To enable Program graduates to help service the needs of the Hispanic community and to integrate themselves effectively into an English speaking cociety.
- 5. To maintain the standards and current regulations of Elmhurst College and governing accreditation agencies in administering an off campus degree program.

Key College Program Personnel: Dr. Mertha Bazik, Coordinator Hispanic Extension Program

Dr. Michael Feldman, Director, Center For Special Programs

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The Elmhurst College Center for Special Programs was established in 1975 as a unit of the College that was primarily responsible for the development and implementation of educational opportunities for adults (credit and non-credit) beyond the traditional time, place or program normally associated with institutions of higher education. Part of its mission was to respond to requests for educational services from the Community at large and to emerging needs emanating from the professions, business and industry and the community as it perceived them. With this mandate as its guide, the Center established eight major programs that are presently serving a variety of adult constituencies in varying formats.

Of the eight Center programs, Elmhurst College would like to nominate for the ACT-NUEA award in continuing education (instructional programs category) its Hispanic Extension Program. As a credit-degree program offering a major in business administration at one Chicago based center (as of September, 1976) and an integrated major in psychology and sociology offered at a second Chicago based center (as of September, 1977), the Program has had a significant impact on the lives of hundreds of Hispanic adults residing in the Chicago metropolitan area. The Program was conceived as a result of receiving requests from leaders of the Hispanic community for educational programs for Hispanic adults with limited English proficiency. Upon receiving these requests, staff at the Center For Special Programs responded by designing a unique instructional program and delivery system that would meet the needs of this constituency. During the past two years Center personnel believe that it has been effective and timely in treating those educational concerns that were brought to its attention.

The major objective of the Hispanic Extension Program is to enable Hispanic adults with limited English proficiency to have an opportunity to begin or continue their educational studies at the college level before gaining fluency in the English Ianguage. This objective is realized by offering courses during the students' freshman, sophomore, and junior years that are staffed by instructors fluent in both Spanish and English. Additionally, courses that are scheduled during the first year of instruction are taught primarily in Spanish; however, instructors are encouraged to introduce English as a medium for instruction gradually beginning in the first year. During the sophomore and junior years, the use of English is gradually increased so that by term two of the junior year, the students are expected to function competently in English. This expectation is important as classes on the senior level are staffed by instructors who are not versed in Spanish.

In order to facilitate student acquisition of English language skills, the College offers to students elective credit courses in English as a second language. These courses specifically focus on reading, writing, and speaking skills and will help prepare Program students for their senior year instruction and post-graduate careers.

Their age span ranges from eighteen to fifty-five, with the average age being approximately thirty. Many of the students have taken some post-secondary study in their native countries. The majority of them are employed full-time during the day and take a three-course, full-time class schedule at night. Continuing at this pace, students can expect to graduate in approximately five, and one-half years.

Presently the Program has enrollment of approximately two hundredsixty students, most of whom live and work in Chicago. According to the
1970 census figures, the two areas in which the College has located its
Centers contain some of the city's largest concentrations of Hispanic
Americans, approximately sixteen thousand in each area. Statistical
reports based on the English proficiency of all Hispanics residing in
Chicago that were recently published in the Chicago Tribune revealed
that approximately fifty-five percent of these people possess little
or no ability to speak or read the English language. These statistics
further reinforce the need for the Hispanic Extension Program as presently conceived for the Chicago area.

The Center developed its Hispanic Extension Program in conjunction with two Chicago-based groups. In the fall of 1976, in cooperation with the First Spanish United Church of Christ, the Center initiated its bilingual program by offering courses leading to a management certificate. This initial offering was subsequently expanded in the fall of 1978 to a baccalaureat degree program in business administration. In the fall of 1977, the Center, in cooperation with the Spanish Episcopal Services, a non-profit social service-oriented agency, launched an integrated degree program in psychology and sociology with the purpose of cultivating student expertise in the areas of mental health and social work. Subject majors for both centers were selected on the basis of the most perceived needs of the Hispanic community.

Cooperative efforts with its Chicago-based Hispanic groups also included strategies for marketing the Program. Marketing strategies included newspaper releases, paid advertisements, radio announcements,

and television appearances, all of which were directed toward Hispanicoriented newspapers and broadcast stations. Communications with various Chicago area Hispanic organizations were also made to publicize the Program.

on both individuals within the Hispanic community at large but also on Elmhurst College itself. In statistical terms, the Program has contributed significantly to both the College's enrollment and tuition income, and has allowed the College, through the Center, to continue to offer low cost community programming. It has also influenced and inspired many of the College's full-time faculty to become meaningfully involved and committed to the Program. Additionally, it has allowed the College to make an important and creative contribution to a minority group that was in need of educational services that could not be serviced in the traditional format.

The impact on the lives of Program students has been and will continue to be significant. The students have recognized that the College has created a machanism to enable them to achieve what they might not have been able to do within a traditional college program. For this they are most appreciative and perform in a highly motivated fashion. They realize that upon graduation they will not only be able to more effectively integrate themselves within this society, but also will accrue the values of a liberal education and the marketable skills necessary for a fulfilling career.

The Hispanic Extension Program is important to Higher Education in general Because it addresses itself to an innovative process of

educating non-English-speaking students at college and university levels. The Program concept and its approach are unique in that it enables such individuals to obtain a college education and English language proficiency without experiencing the undue frustration and hardship that often accompany the educational endeavors of many non-English-speaking students attending American colleges and universities.

The major problem encountered in a program of this nature is the availability of bilingual faculty with appropriate credentials and experiences that understand and share the philosophy of the program. By being located within a great met politan area which contains a multitude of institutional resources, Center Program administrators have been fortunate to have been able to draw upon the resources of Chicago and its own institution for locating appropriate faculty. A second major concern for a program of this nature is in the area of tuition assistance for students. Sources of available funding must be identified. In developing the Hispanic Extension Program, the Center drew upon the assistance of a private foundation grant (the Frederick E. and Ida H. Hummel Foundation), a state scholarship program (Illinois State Scholarship Commission) and a federal program (Basic Opportunity Grant).

The Center believes that there are several reasons for the success of the Hispanic Extension Program. As previously stated, it provides a vehicle for non-English-speaking Hispanic students to pursue an education at the college level; secondly, the Center works in a cooperative relationship with two Hispanic Chicago-based organizations; thirdly, the Program students receive assistance in tuition from federal and state sources; fourthly, the academic program offered is highly

qualitative and is closely monitored and supervised. It is for these reasons that the Program has attracted a significant number of students in both of its degree programs.

The motivation, industriousness, and enthusiasm displayed by Program students reflect the commitment to this Program by Elmhurst College, the cooperating groups and the Program students. The College is proud of its association with the First Spanish United Church of Christ and the Spanish Episcopal Services and looks forward to its continued educational service to the Chicago Hispanic community through the Hispanic Extension Program.

Program Name: PEER COUNSELING PROGRAM

Name of Principal Person(s) Responsible for Entry: Nancy C. Gelling

Person(s) or Institution to Whom Award Would be Made: Nancy C. Gelling and University College of Syracuse University

Source(s) of Funding: None needed.

cost of Program: None. This is a volunteer program. The cost to the participant is the amount of time he or she is willing to donate.

Number of Participants in Program: Fourteen peer counselors.

Objectives of Program: To extend the counseling services for adult students at University College by: (1) improving the accuracy of information given via the telephone to the adult population seeking information about courses and programs offered through University College; (2) providing a peer support unit for adult students attending University College; and (3) involving students in the counseling program.

In the fall of 1976, the Director of Counseling and Student Services at University College called together a group of seven students to "brainstorm" with her about the possibility of beginning a peer counseling program for adults. Each student asked to join the initial discussions was hand-picked and representative of the heterogeneous population continuing their education at U.C. -- a single parent ... a veteran studying under the G.I. Bill ... a suburban housewife with young children ... an adult in mid-career change ... a minority student. All were seeking jobs or better jobs or promotions. All were in different stages of their educational careers. Some had just begun ... others were U.C. alumni pursuing graduate programs ... and still others were in the midst of undergraduate degree programs. All had expressed interest in the counseling services we offer and had indicated their desire to help other students "get started." Most of them were already recruiting friends and relatives to continue their education at U.C.!

We began by discussing the existing counseling service and ways in which this service could reach more people. We talked about ways in which the service could be improved. The Director shared her thoughts with the group and identified some of the needs of the office.

The Counseling Office at University College is one of the busiest offices on the Syracuse University campus. Over five thousand people schedule appointments to see a counselor each year. The professional counseling staff numbers three. The advertising for the College encourages any and everyone

in the community interested in continuing their education to call or visit the Counseling Office for information. It is the port of entry. During peak counseling times prior to and during registration, a minimum of one hundred twenty-five calls are received each day!

The group decided that their first project would be to work on improving the accuracy of the information given via the telephone. After an intensive training program geared to helping the students answer the great variety of telephone inquiries coming into the office, the seven agreed to answer telephones in an experiment conducted during the January 1977 registration period.

Reinforced by their success in handling the inquiries, they became more confident and could now identify areas of concern common to many adult students. They wanted more informs on resources available and more training so that they could do an even better job in handling the questions students asked. They soon realized their limitations and learned when it was best to refer students to the professional staff. They realized that, even as volunteers, they could be threatening to old-time office and professional staff members, and openly discussed their role in the office structure and ways to handle difficult internal situations.

Both the office and professional staffs began to applaud their efforts and to find them helpful. The feedback from the students they serviced was also extremely positive. They decided to do it again during the summer registration and again in the fall. When classes began it was difficult for each student to devote the time they had given between semesters and during registration to the project because they, too, had classes to attend. It was decided that their presence in the office was not needed and that a "Call Back"



service sufficed until the next registration period.

Slowly, the peer counseling program began to take form. We took pride in thinking our peer counseling program was a first of its kind in an adult education setting. The concept of using students with whom other students could identify was particularly effective with adults. We liked the telephone service because many students took the time to call and ask questions via the phone instead of making a trip to the College to ask them.

A brochure was carefully designed to explain the telephone service and the people who comprised it. A phone dial emerged as the group's logo. A large poster featuring this dial and the pictures of the peers was placed in the hallway outside the Counseling Office. Stories began to appear in the local newspapers about the program. LINK, the U.C. student/faculty/staff newsletter, featured stories about them. The peers became role models with whom students could identify. The phones began to ring for "Dianne" or "Willie" or "Ann." Students wanted to discuss their courses... their instructors... their difficulty using the library... study habits... how to write term papers... the parking problems... finding baby sitters... and their fears and doubts about their ability to do college work. Many instructors referred students with problems to the peers.

The more questions asked, the more training the peers required and requested. The group continued to meet each week to evaluate their progress and to discuss procedures and policies ... to role play conversations and to discuss better ways of handling certain questions and situations ... and to develop better listening techniques. The peers also continued to



"brainstorm" with the Director and to feed back to her areas of stident concerns and suggestions for improved services. In the process, they helped organize a series of MAJOR NIGHTS which brought professors from various departments on campus to U.C. to discuss their fields. They identified the need for recognizing outstanding scholastic achievement and helped the Director organize an honor society for adult students in May 1977. They arranged bus tours of the main campus and took students on tours of the library. They even designed peer jackets with a dial logo so that they could be easily identified when touring student groups. In addition, they developed an hour-long radio program featuring the peers and telling about their service. They also spoke before groups in the community, encouraging others to continue their education.

In the spring of 1978, the seven original peers met to evaluate the program and decide the future of the group. We solicited feedback from students using the service. Each peer counselor evaluated his or her own effectiveness in handling the problems presented, and the professional staff evaluated each peer counselor's performance. We concluded that the accuracy of information given over the telephone improved significantly. The professional counselors were relieved of general information-giving over the phone and could thus devote more time to students visiting the office.

Peer counselors, on the other hand, could devote more time to each individual making inquiries via the telephone. Emotional and other support afforded by peers who had themselves experienced returning to school encouraged many new students "to try."

Since there had been job changes and not every one of the peers could devote the same amount of time to the project, it was decided to open the group to new members who would take on the telephone responsibilities.

Applications were designed and accepted from any student interested in the peer program. Seven new members were chosen to join the group this fall.

Some of the original peers expressed a desire to interact with students directly instead of via the telephone. As a result of this request, we began a second phase of our program this fall. Three peer counselors now have office hours one evening a week and are involved in one-to-one counseling. A member of the professional staff is also available these evenings for consultation or referral if necessary. On-going training sessions remain the essential part of the program. Some of the original peers help in this training. Others are working to develop a speakers bureau featuring students who will share their educational experiences with community groups, with the hope that this will encourage more people to continue their education.

In July 1978 the original seven peers celebrated the success of their program at the first annual "Roast and Toast" party. This program seems to have brought a great sense of personal satisfaction to each of the peers. Several have changed career direction as a result of the training and experience. We feel it has added a welcome dimension to the counseling service at University College ... and our adult students keep dialing our number?

Program Name: ADULT LEARNING SERVICES

Name of Principal Person(s) Responsible for Entry: NANCY C. SELTZ & SUSAN EL-SHAMY

Person(s) or Institution to Whom Award Would be Made: MANCY C. SELTZ

Source(s) of Funding: FUND FOR THE IMPROVEMENT OF POSTSECONDARY EDUCATION AND INDIANA UNIVERSITY

Cost of Program: Year I - \$ 81,715. Year II - \$130,651.

Number of Participants in Program: 5560 as of December 31, 1978

Objectives of Program:

Adult Learning Services is a systematized pre-entry service designed to aid adults throughout the state of Indiana in gaining information about and access to further education. It is an attempt to match the educational needs of adults with the resources of all postsecondary institutions in the state. ALS provides adults with:

- 1. Information and referral systems to assist adults in choosing educational resources appropriate to their personal and occupational objectives, including a telephone-in service.
- 2. Free on-site orientation programs called Return to Learning Workshops, to acquaint adults with the requirements and procedures of returning to education.
- Advisement seminars on self-assessment, goal setting, and educational/career decision making.
- 4. Counsel@ag/advising opportunities with a counselor trained in the special needs of adult learners.

The Adult Learning Services (ALS) of the School of Continuing Studies at Indiana University is a university based educational information system which disseminates information about and provides referral to all public and private postsecondary institutions in the state of Indiana. ALS was established in 1977 with a two year grant from the Fund for the Improvement of Post Secondary Education (FIPSE), and since that time has provided pre-entry advisement and referral services to nearly 6,000 adults throughout the state.

Although the concepts of education information services and educational brokering are not new, the majority of such services throughout the country exist in community based or consortium arrangements. Contrary to this trend, the Adult Learning Service established a unique approach by incorporating educational brokering principles into an adult student service function for a multi-campus state university system. At the time ALS was initiated, only two other institutions (e.g., the University of Wisconsin and Colorado Mountain College) were developing similar services, and both of these were staffed by part-time community-based counselors. The ALS system tests out the premise that impartial educational advisement can be provided by counselors employed by a continuing education unit of a public postsecondary institution.

By providing these services the School of Continuing Studies had taken a leadership role in placing Indiana University in a position to positively respond to the growing needs of a major segment of the citizens of the state. The design of this multi-campus project appears to be a workable approach for statewide continuing education systems. Therefore, it should have wide applicability and strong implications for many other statewide public firstitutions. Hopefully, the ALS experience will encourage the modification

of existing postsecondary student services to accommodate the needs and aspirations of adult learners.

Background And Need For Service

A wide variety of postsecondary opportunities are available to adult learners in Indiana. Individual institutions throughout the state are developing and offering credit and noncredit educational alternatives including traditional degree programs, vocational training, public school adult basic education, study by correspondence, in-service training within business, government, and social agencies, university continuing education courses, and—most recently, an External Degree program developed by Indiana University. As more and more adults consider these educational alternatives, they frequently are overwhelmed by the array of opportunities available as well as the complexity of relating educational objectives to their personal and career goals. Furthermore, as they attempt to make their individual decisions and select appropriate educational resources, they are often confronted by institutional procedures and practices which impede their participation in the educational process.

Although institutions have developed programs and have established services to recruit, counsel and support traditional students, they have not devised approaches which respond directly to the needs of adult learners. Conversely, adults have been reluctant to participate in educational programs which may not match their personal and career decisions or accommodate their needs as working persons with family and community responsibilities.

Traditionally the pre-entry and early entry services of postsecondary institutions have focused their efforts on moving high school seniors into two and four-year undergraduate programs. Usually supported by the

appropriated funds of the institution, the recruitment, orientation, and pre-entry counseling functions generally are directed toward eighteen-year-olds entering the postsecondary setting for the first time. These activities are interfaced with the counseling services of the secondary schools, which in addition to helping students define their educational and occupational goals, serve as a conduit for disseminating information, about alternative postsecondary opportunities.

In Indiana a comparable mechanism did not exist for the potential adult student. Excluded from the counseling services of the secondary school and the pre-entry services of the postsecondary institutions, adults did not have access to information about the broad range of learning activities available to them. Attempts to involve adult students in postsecondary education generally have concentrated on broad marketing approaches such as television and print media advertising. With the exception of personal development workshops offered by some institutions usually as part of their Continuing Education for Women programs, advisement services (providing self-assessment; personal, educational, and career decision making) or orientation into the educational process have been unavailable to prospective adult students.

Program Objectives

The primary goal of the Adult Learning Service has been to develop, systematize and implement a series of impartial educational information services for adults on five Indiana University campuses. To accomplish this, a central coordinating office was established in the statewide School of Continuing Studies and five half-time counselors were hired to deliver services in Fort Wayne, South Bend, New Albany, Bloomington,

and Richmond. As a function of the Continuing Studies unit on their respective campuses, each ALS center offers the following services:

- 1. Telephone Information and Referral system.
- Return to Léarning workshops offered at work-site locations.
- 3. Advisement Seminars providing self-assessment, goal setting, and educational-career decision making.
- 4. Counseling and advisement with(a counselor trained in the special needs of adult learners.

From the beginning of the project, a concentrated effort has been made to maintain impartial brokering services. ALS brochures and materials avoid using Indiana University logos and titles, (See Appendix A), and handouts used in the Return to Learning workshops include a three to five page listing of the various educational opportunities available in that area. (See Appendix B).

Clientele

From the earliest planning stages of ALS, there has been great concern about the definition of the clientele to be served. In the original organizational planning paper, (See Appendix C), the potential clients of the service were generally described as adults excluded from established higher education access systems. The services were designed to meet the needs of persons who might have negative feelings about education from previous experiences. These persons could be considering job advancement or midcareer change, be involved in a life changing crisis, either economic or personal, or seeking self satisfaction through education.

To design accurate marketing procedures, specific market populations for ALS services were identified. These included employees in business and industry, office and service workers, women re-entering or advancing in the job market, rural residents, and economically marginal groups. The counselors

sought out the logical locations where each target group could be contacted through a central agency, office or distribution center. For example, working adults were contacted through personnel offices in plants and businesses, labor unions, and worker organizations. Potential rural clients have been reached through County Extension offices and farmers' associations. Contact persons, called key linkers, were identified for each site, and they have served as organizers for off gampus services, as distributors of brochures, and as referral sources.

To date 865 individuals have used ALS information services, 1002
people have attended Return to Learning workshops, and 3652 other adults have attended talks, workshops and seminars promoted by ALS. (See Appendix D). As we begin to follow up the client referrals, certain trends are becoming evident. A breakdown of the 1867 clients seen individually or as participants in the Return to Learning workshops shows that there is an almost equal split between referrals made to Indiana University and those made to other institutions. Approximately 20% of all clients have been referred to non-educational agencies.

Planning and Development Efforts

The conceptual planning of the service and the funding proposal submitted to FIPSE was carried out by Nancy C. Seltz in consultation with the
late Robert W. Richey, the Dean of Continuing Studies at Indiana University.
Professor Seltz consulted with other continuing education professionals
(e.g., Dr. Vivian McCoy, University of Kansas and Dr. Keith M. Buckley from
the University of Minnesota) and leading educational brokers during the
design stages. Further planning and consultation took place between the ALS,
staff, the Dean, campus chancellors, and campus directors of Continuing Education before the service was organized. After the ALS, counseling staff was

hired. Mr. Donn Vickers, from the National Center for Educational Brokering, served as a consultant for ALS in-service training to help clarify the services objectives and determine a working procedure. During these sessions, the ALS staff developed a procedural planning document which has held up throughout the development stages and remains a guiding principle for the implementation of the services. (See Appendix C).

The first year of the ALS project was mainly one of program development and promotion. ALS counselors at each campus gathered information on the various educational opportunities available in their area and made contacts with business, industry, social agencies, and educational institutions.

These contacts build 'linkages' between the resources of business, industry, social services and educational institutions and the needs of potential adult learners in the community. This is a two-way link. The worker at the RCA plant may want information on further education while the student at IVY Tech may want information about in-house training programs at RCA.

The Community Action Program client may need information on high school evening programs: the high school evening student may want information on the Community Action Program. ALS acts as a broker by supplying information and referral services to all concerned.

Also from the beginning of the service a concentrated effort has been made to maintain an institutional impartiality by establishing collaborative relationships between ALS and other postsecondary institutions. A specific example of this would be the Learning Fair sponsored by ALS-Bloomington which involved 35 institutions who shared their educational "wares" with over 1500 persons at a regional shopping mall. ALS also has cooperated with other education information systems (e.g., Consortium of Urban Education in Indianapolis and the Louisville Equal Opportunity Center) by sharing

resources including referral data, staff in-service training and active participation by ALS counselors.

Contact has been made and is continued with key linkers for specific client populations. ALS counselors have given talks, made presentations, handed out literature, and conducted workshops at numerous sites accessible to the various target groups. For example, the ALS counselor in Fort Wayne has given talks and workshops on-site during the lunch hour at such industries as Central Soya, Donnelley, International Harvester, and North American Van Lines. All ALS counselors have spoken to or presented workshops for community agency groups, women's groups, Jaycees, Kiwanis and other service organizations, unions and office workers organizations, and county extension and farmers' associations.

Impact

Although the immediate impact of the services described has been to provide potential adult learners with access to information about postsecondary opportunities in Indiana, the ALS experience has even greater significance when the long term implications of the project are considered. The educational brokering concept inherent to the Adult Learning Services appears to be unique for large public institutions. Rather than serving just as a recruit went function for Indiana University, ALS places the University in the role of impartial advocate for higher adult education. By taking this proactive position, Indiana University provides a much needed response to the growing needs of a major portion of the state's tax paying population.

This impact has become evident within the five service site communities. As discussed earlier, a primary goal of the first year of the project was to establish "community linkages." These linkages have become important for several reasons. By building interinstitutional ties and opening channels

been facilitated. The personal contacts, the interest and the helpfulness of the ALS counselors in their work with the other educational institutions have helped decrease the doubts about the dominance of "the large, statewide university system." Through these activities ALS has provided the means for the other institutions to obtain information about each other as well as about the various business, industrial and agency programs in the community.

The success of the ALS approach already has helped redefine the meaning of educational brokering. Since its beginning the official position of the National Center for Educational Brokering has stated that impartial educational information only could be provided by organizations external to any one educational institution. This stance was altered in October of 1978 when both the ALS director and a representative from the National Center participated in a program organized by the Ohio Board of Regents. In recognition of Indiana University's approach, the Center's speaker agreed that brokering could function "inside, outside, and alongside" academic settings.

The Adult Learning Service approach has broadened the scope and meaning of adult student services which generally provide assistance to students enrolled in continuing education programs. ALS is a type of university service function which can be delivered best by a continuing education or extension organization. It combines the knowledge of continuing education marketing, client-centered counseling, and supportive adult education principles. ALS serves as a recruiter of adult students, not only for its own institution, but for all others in its service area. This systematized adult pre-entry function gives the School of Continuing Studies a new and important leadership role within Indiana University. As adult student enrollments increase, the Adult Learning Service will have an even larger

role to play within the university. Its client-centered approach will encourage the retention of adult students enrolled in the various departments of the institution.

One important long range social impact of ALS will be a more natural acceptance of adults who are seeking further education -- acceptance by institutions, by the general public and by the adult learners themselves. Hopefully, this project will significantly contribute to the evolution of adult education as a natural, expected phenomenon which occurs at various times throughout the lives of all individuals.

Problems and Solutions

Perhaps one of the most complicated tasks undertaken by ALS was the organization and administration of a new program simultaneously initiated on five campuses of a diversified state university system. Each participating campus not only has its own unique regional difference (i.e., a large urban campus or a small center in a rural area), but each has an autonomous budget and local authority for hiring and operational procedures. Under this complicated governance arrangement, the ALS counselors have reported to local campus continuing education directors who supervise their portion of the ALS budget. To operate, the ALS central office has had to maintain the continuous support and cooperation of the local campus directors.

Funding of staff salaries has been another concern. The ALS counselors have split appointments devoting halftime to ALS and halftime to other, counseling duties. The factors of shared time and mixed responsibilities have proved difficult for the counselors and sometimes have restricted the full development of the service activities. Various procedures have been instigated to overcome these problems (i.e., Quarterly staff development seminars have provided on-going coordination and training for the ALS



counselors and support personnel. Also, the ALS director meets periodically with the campus continuing education directors on matters of policy and procedure). Local ALS activities are monitored through quarterly client service reports and biannual site visitations by the central office staff and outside consultants. Since all promotional materials are prepared in the central office, there has been a uniformity of public image among all participating sites. By recognizing the individuality of each participating campus and by allowing each to shape their service within the particular framework of their campus needs and resources, the operational frustrations have been minimized.

At first there was a philosophical resistance to the ALS approach. Educational Brokering seemed startling to many persons both within and outside the aniversity community. While the idea of Macy's sending customers to Gimbel's might seem amusing in an old film, the thought of Indiana University steering prospective students to other institutions has not been taken so lightly. Continuing education administrators responsible for self-supporting programs originally were reluctant to accept a brokering service that might detract from their enrollments. However, after reviewing the results of the first six months of the service, they have come to appreciate, the positive ramifications of a new public relations approach as well as their new leadership role within the University.

Interestingly enough the greatest support for ALS has come from the highest administrative levels of the University. This is due in part to the University's concern with the recruitment of new students in an era of declining enrollments, but ALS is seen as a worthy public relations service to the citizens of the State.

Program Name: Wisconsin's Energy Extension Service: A Study in Matrix Organization

Name of Principal Person(s) Responsible for Entry: William R. Bernhagen

Person(s) or Institution to Whom Award Would be Made: University of Wisconsin-Extension

Source(s) of Funding: U.S. Department of Energy

Cost of Program: \$1.1 million

Number of Participants in Program: 515,525

Objectives of Program:

- to provide face-to-face services to small energy consumers.
- to encourage the development of formal systems to provide feedback to decision makers concerning barriers to consumer action in order to facilitate the removal of these obstacles.
- to encourage the development of innovative services and methods of service delivery.
- to provide incentives to build a stable organization and network of energy conservation information that will be in place at a time of higher energy prices and that will encourage the actions of individuals and organizations that influence energy conservation actions (builders, architects, etc.)

WISCONSIN'S ENERGY EXTENSION SERVICE: A STUDY IN MATRIX ORGANIZATION January 15, 1979

Rationale

With the passage of the National Energy Act, and the likelihood of State Energy Management Plan (SEMP) legislation passing Congress in the near future, there is every reason to believe that university involvement in energy education will increase. With this growth will come the need for universities to develop administrative procedures and organizational structures that will:

- foster partnerships with public agencies and the private sector;
- encourage the development of innovative services and methods of service delivery;
- o maximize the use of existing institutional capabilities; and
- insure the involvement of all appropriate disciplines and functional areas.

To this end, the matrix concept of organization has worked exceptionally well in energy programs at the University of Wisconsin-Extension. This paper demonstrates the benefits we gained by moving to such a form of organization. Our hope is that other states and universities might learn from this experience and apply those elements that are relevant to their own unique organizational characteristics.

In 1977, the University of Wisconsin-Extension, in cooperation with the Office of State Planning and Energy, was one of ten states awarded a 1.1 million dollar federal grant to "test programmatic approaches that might have wide applicability in the implementation of a nation-wide Energy Extension Service." With acceptance of this award, UW-Extension moved to a matrix organization (coordinated through Wisconsin's pilot Energy Extension Service) to address state energy education needs (see Figure 1). Wisconsin's experience with this innovative organization approach clearly demonstrates both the administrative effectiveness and acceptability of a matrix organization for facilitating energy education within a multidisciplinary and multiagency environment. Since its inception, Wisconsin's Energy Extension Service regularly reaches one-quarter to one-half of the state's

4.6 million citizens through the public media. Its training programs



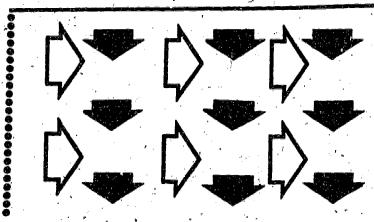


Conceptual Matrix Organization*

Functional Units e.g. engineering, economics, agriculture, etc.

Program Area

Energy Extension Service



*Multidisciplinary programs (e.g. energy) "borrow" expertise from traditional/existing organization/functional units for specific programming efforts. Overall personnel administration, however, remains with the functional units.

for professionals, (who in turn provide professional energy services to citizens), have produced a tremendous multiplier effect that provides services to virtually all major socioeconomic groups within the state—including low—and moderate—income families, small businesses, public utilities, and local governmental units. The results of this program, when combined with the energy conservation efforts by Wisconsin's Public Service Commission and the Office of State Planning and Energy, has placed Wisconsin in the enviable position of being one of a few states to actually accomplish zero energy growth.

Organizational Structure

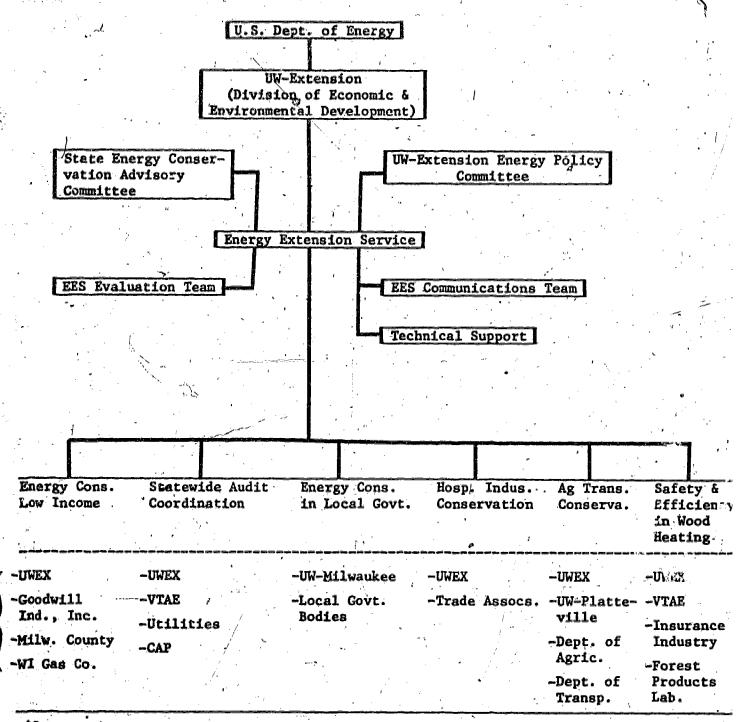
The organizational framework for Wisconsin's Energy Extension

Service is illustrated in Figure 2. Funds flow from the U.S. Department

of Energy to Wisconsin's Office of State Planning and Energy, and then

to UW-Extension.





*Cooperating institutions by project.

Within UW-Extension, the Energy Extension Service "cuts across" all four programmatic divisions: Economic and Environmental Development, Educational Communications, Professional and Human Development, and Urban Outreach. The Energy Extension Service is "housed" within the Division of Economic and Environmental Development, but is responsible to, and works

ing and michael West of April 1981 and 1981 and

closely with units within all four divisions. In this respect, EES represents a true matrix organization—having EES activities and technical support within many programming units that involves all divisions. Because of this matrix organization, EES is in an excellent position to serve as the coordinating mechanism for Extension's energy thrusts.

Figure 2 also illustrates that the Energy Extension Service (EES) is "tied" to both public review and internal UW-Extension review through separate advisory committees. The State Energy Conservation Committee represents a cross-section of Wisconsin interest groups and serves in an advisory capacity to both the EES program and the State Energy Conservation Plan. The UW-Extension Energy Policy Committee is advisory to EES and to the UW-Extension Chancellor on energy affairs. Outside of UW-Extension, EES serves in a coordinating role to facilitate the delivery of energy education and services to different participants in the technology educational transfer network chain (Figure 3).

Program Objectives

In developing an organizational attructure to meet state energy needs, UW-Extension, in cooperation with the Office of State Planning and Energy, identified a number of specific organizational objectives:

- Use of existing functional units--emphasis on integration and coordination as opposed to total reorganization of UW-Extension's administrative structure.
- Use of Wisconsin's total educational outreach resources (not only Extension's).
- Integration of energy outreach education into other state energy activities, and other educational programs.
- Minimal economic impact to the state if federal dollars are lost:
- Link energy education to knowledgeable state technical resources, including the University of Wisconsin System.
- Provide "quick response" capability to address state energy education needs.
- · Use of existing/proven communications networks.

TECHNOLOGY TRANSFER & THE EDUCATIONAL & SERVICE NETWORKS

Technology Transfer Chain

Networks Products Providers Sanctioners Consumers **eUW-Extension** •Engineering & •Continuing Educ. County Agent Business, Courses for Professionals Services for Designers & & Managers in ●Public Radio Managers~ Insurance, Lend-& TV ing & Regulatory Institutions, etc. Special Programs ●Vocational, eTechnician & Continuing Educ. Adult Evening Technical, & Skilled Labor for Skilled Courses Adult Educa. Training & Personnel in System ' Refresher Fire Departments New Linkages Courses •Utilities •On-The-Job •Special Seminars Service & Training/for for Mortgage Consultation Own Employees Lenders by Utilities Community •On-The-Job •Direct Pro-Action ' Training for vision of Program Own Employees Service Office of State Planning & Energy (overall coordination)

Since October 1977, Wisconsin's Energy Extension Service has demonstrated the effectiveness of Extension's matrix organization to achieve these objectives. It has accomplished this while meeting, or exceeding, all specific programming objectives. Specific changes have occurred at three institutional levels:

- Energy education responsibility within Extension rests with the individual programming unit. Coordination and management of the many programs is done through the Office of the Director, Wisconsin Energy Extension Service.
- Ties between the University of Wisconsin-Extension and the seven state agencies with energy conservation responsibilities have been significantly strengthened.

e Working relationships between the University of Wisconsin-Extension and other public and private organizations involved in energy education for adults (including utilities, insurance companies, and consumer groups) have been established—many for the first time.

Impact on Client Group (individuals, institutions & communities).

Wisconsin's Energy Extension Service serves the energy education needs of the state's consuming public and selected professional groups through six major projects. Specific client groups for each, along with delivery methods and numbers reached, are presented in Figure 4. The Energy Extension Service regularly reaches a quarter to one-half of Wisconsin's 4.6 million citizens through the public media to promote the six projects, which provide training to numerous professional groups, including small business owners and operators, engineers, energy auditors, architects, firemen, and government officials. Training provided to these professional groups provides a tremendous multiplier effect when they, in turn, provide services and training to their client groups.

The Wisconsin Energy Extension Service is cooperating with the following institutions in delivering energy education to Wisconsin's citizens:

- UW-Extension (7 departments)
 - Goodwill Industries, Inc.
 - · Milwaukee County Commission on Aging
 - Milwaukee area retailers & community groups
 - o VTAE
 - · State utility companies
 - UW-Milwaukee
 - UW-Madison
 - UW-Platteville
 - e Hospitality Industry trade associations
 - . Private engineering consulting firms.

The Energy Extension Service has also worked through UW-Extension to establish Wisconsin's 72 county Extension offices as "Energy Information Centers." Wisconsin's EES is directly working with three of the University of Wisconsin's four-year campuses and has informal ties to virtually all of the state's four-year campuses. In addition, to bring demonstrations of sound energy conservation practices to public buildings.

Figure 4

Energy Extension Service Clientele

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at the community level, EES is working directly with elected and public officials of the following municipalities: 'Cudahy, Milwaukee, Sister Bay, Lancaster, Dodgeville, Neenah, and Fond du Lac.

Problems Encountered & Solutions Attempted

As in any new program, the Energy Extension Service has experienced a number of administrative/organizational problems. Four of the major me problems encountered are identified and discussed in the following:

Organizational Problem

•Merging BES into Extension's ongoing energy activities.

education activities should be the responsibility of the Office of State Planning and Energy, and which should be Extension's/EES's.

 Organizing for local consumer assistance.

Problem Resolution

Problems associated with EES's relationship to ongoing Extension energy programs was resolved by UW-Extension forming an Energy Policy and Planning Committee "to work out relationships, assign energy programming responsibility and arbitrate conflicts."

The Office of State Planning and Energy is primarily responsible for developing and implementing state energy policy. Since UW-Extension is specifically restricted from this activity, it was agreed that the State Office of Planning and Energy should be responsible for all energy information related to policy formulation and implementa-

tion, and that UW-Extension would cover all

other energy education information

dissemination.

Early in the development of the EES program, it was recognized that energy activities cut across disciplines; consequently, it would be virtually impossible for any one individual or county agent to handle all energy questions. Yet there was a need to assist consumers with energy-related questions. For this reason, a decision was made to have county offices serve as county energy referral centers. By establishing county reference and referral centers, Extension agents function as a receiving or clearinghouse for energy questions; they do not, however, function as "energy experts."

Organizational Problem

•Collaborating with other educational institutions with outreach responsibility.

Problem Resolution

In Wisconsin, the Vocational, Technical, and Adult Education System and the University of Wisconsin-Extension have responsibility for educational outreach activity. For this reason, it was important that the roles of each institution be clearly defined and areas of cooperation identified. To assist in this effort, the Energy Extension Service provides funding for both institutions to: 1) develop programs specifically for their client groups; and 2) jointly develop programs where responsibilities overlap.

Without wasteful duplication, the University of Wisconsin-Extension has made effective use of existing agencies, institutions and sources of technical expertise by using a matrix approach to energy programs. In so doing, we have reached clients and delivered information and programs with the highest degree of efficiency. Although states and universities differ in terms of organizational characteristics, resources and energy priorities, the essence of the matrix concept is applicable to interdisciplinary and multi-agency energy efforts throughout the United States.

Program Name: Citizen Involvement Training Project

Name of Principal Person(s) Responsible for Entry: Kevin Grennan Stan Rosenberg

Person(s) or Institution to Whom Award Would be Made: Gitizen Involvement Training Project

University of Massachusetts/Amherst

Source(s) of Funding: W. K. Kellogg Foundation (additional support Polaroid and

Blanchard Foundations)

Cost of Program: \$188,000

Number of Participants in Program: 7,650

Objectives of Program:

The Citizen Involvement Training Project is an extension program of the Division of Continuing Education, University of Massachusetts/Amherst. Growing out of an urgent need for training for the citizen participant, the project is designed to encourage, maintain, and increase effective citizen involvement in the decision-making processes of government by providing educational tools and experiences in a variety of formats. It, accomplishes this objective through the development and distribution of training materials and workshops, training trainers throughout the state, providing consultation services, the development of a resource library, by working through the media to promote citizen involvement, and through dissemination of materials to other institutions of higher education.

The Citizen Involvement Training Project

"The most important office is that of private citizen," said Lewis D. Brandeis.

INTRODUCTION

The Federal government's programs for a Great Society of the sixties introduced the idea of the right of citizens to be involved with planning and directing programs which involved them. Then during Watergate, when a great wave of soul searching swept across the land, individuals and groups began to recognize the real extent to which institutions which affected their lives needed citizen oversight and involvement. People began to realize that appointed or elected leaders could not be counted on to implement the will of the people automatically. Carefully structured and immediate citizen involvement was needed at all levels of government and within all institutions affecting the lives of citizens. Within two years after Watergate, community action boards, neighborhood involvement networks, and citizen advisory groups doubled in number and intensified their work. The response to Watergate, in terms of voluntary efforts by individuals, civic groups, and private agencies to become more active in the democratic process, was strong. But the frustration met was even stronger, as many untrained, ill-prepared groups proved ineffectual in effecting change.

Nevertheless, the concept of citizen involvement was becoming recognized, not only as a response mechanism to proposed or imposed laws, regulations and other social situations, but also as an active, catalytic process for democratic community management. Massachusetts made significant progress in

providing official support for citizen involvement. The Massachusetts
Office for Children established Councils for Children made up of citizen
volunteers which have real monitoring and evaluation functions. The Office
of State Planning helped to pass enabling legislation to create a local
growth policy commission in each of the 351 municipalities in the state.
These commissions are intended to set local growth and land use policy
through input into the state growth plan. More than 320 towns responded by
creating such volunteer citizen boards. The new projects bolster a statewide
network of over 1,000 citizen advisory boards that contribute to all levels
of public and private institutions.

The people who join these boards do represent the communities from which they come, but like many of us, they have few experiences in school or adult life which would develop their skills and participate effectively in a collective policy-making process. With the support of the Cooperative Extension Service, the Division of Continuing Education at the University of Massachusetts in Amherst designed the Citizen Involvement Training Program to offer training in program planning, community organizing and problem solving, financial management, and the governmental process. A proposal for major support for the project was submitted to the W. K. Kellogg Foundation, which provided a three-year grant of \$188,000 to get the program started.

In two years the project staff has designed and tested training curricula and have offered nearly 600 workshops to 127 different organizations and ever 7,000 individuals. They have prepared 8 resource manuals, totalling nearly 1,000 pages, and planned a network of locally-based citizen trainers through the Cooperative Extension Service. They have decisively proved the visbility of training for more effective citizen involvement.

OBJECTIVES

The Project's major objective is to enable citizen groups to become more effective as they participate in policy development and review and in monitoring and advisory functions. It accomplishes this objective through the development and distribution of training materials and workshops, training trainers throughout the state, providing consultation services, the development of a resource library, by working through the media to promote citizen involvement, and through dissemination of materials to other institutions of higher education.

PEOPLE AND GROUPS SERVED

In its first two years, the Project has served 127 different client organizations. More than 7,650 people were directly involved in training and consultation sessions for a total of 24,690 contact hours.

Client groups, their charges and membership profiles have been diverse and broad. State government agencies served have included the Department of Elder Affairs, the Department of Mental Health, the Office for Children, and the Department of Public Welfare. Local government agencies include councils on aging, state mandated study councils, health planning councils, and community-generated organizations, focused on drugs, rape, Indian affairs, racism, education, human services, health, agriculture, media, and housing have been among the projects clients. State legislators, governof's commissions, and the Corporation for Public Broadcasting have also availed themselves of Project services. Clients have ranged from 15 to 90 years of age and have represented many races, colors, creeds, and political view points.

PLANNING FOR THE PROJECT

The Division of Continuing Education had over time developed some expertise in involving citizens in the work of their communities. Specific focus began to evolve on the problems of citizen involvement and the decision-making process of government through citizen councils in late 1975 and early 1976. The Division discovered that within Massachusetts alone 400 citizen councils and advisory groups were attached to state agencies. When the Division added the councils attached to school districts and other areas and the numbers of voluntary citizen organizations attached to variety of social problems of the state, the number jumped to well over 1,000.

Over 150 interviews were conducted throughout the state with elected and appointed community officials, members of citizen participation councils and professionals connected with local, state, and regional agencies.

In analyzing the problems that emerged, it was apparent that the problems of the councils fall into two major categories which can be described as internal and external problems. The internal problems are caused primarily by the fact that while citizen council members are usually sincere, enthusiastic people, dedicated to the service of their communities, they very often lack the basic skills and knowledge necessary to function effectively in their roles as council members. The external problems seem to be based on the fact that frequently government agencies are also confused by the role a Citizen Council should play in the decision-making process, and are therefore unable to utilize the council as an effective aid to the agency to which it is attached.

In order to make Citizen Councils effective aids to the entire process of citizen involvement, both categories of the problems must be solved. It was discovered, however, that other agencies at the University were already working with government officials in order to help educate them to the role of Citizen Councils. Therefore, the Division of Continuing Education concentrated upon the internal problems: those of ill-trained and ill-prepared council members. In analyzing the training needs of council members, five major problem areas emerged: the technology of the council's field, management for volunteer groups, leadership and decision-making, organizational development, and government operations.

By focusing attention upon a training program that would address these needs, the Division also felt that several indirect goals would be attained.

(1) A smoothly functioning Citizen Council comprised of informed citizens is certain to begin to change the current negative attitudes that many government agencies have of Citizen Councils. And, (2) since many if not most of our communities' elected officials begin their careers by serving on Citizen Councils, the clients trained by the Project will be part of the next generation of elected officials with the skills they will need to be even more effective and responsive in their elected positions.

Finally it was discovered that a certain amount of technical training is already going on. While the agencies themselves are attempting to do some citizen training, they are usually limited by a lack of time, staff, materials, money and expertise. Consequently, the little training that is done is usually only in the area of technology of the field, and the other critical training needs go unattended.

A comprehensive training program, addressing all of the needs described in the problem statement, must be transferable, easily updated, relevant to the participant's immediate problems, as well as able to provide skills that are applicable in a variety of leadership and participant situations. The Citizen Involvement Training Project is the result of an effort to create just such a program, and make it available in a variety of formats so that it will have the widest possible applicability.

IMPACT ON INDIVIDUALS, INSTITUTIONS AND COMMUNITIES

A major priority of the Citizen Involvement Training Project is evaluation, which takes three forms. One is the direct feedback CITP collects at each workshop and consultation session it holds through a short questionnaire completed at the end of each session by participants. The second component is narrative evaluations requested of partic pants at the end of diagnostic-consulting sessions. The third component is an external evaluation. The first two provide information directly from clients about the impact CITP has had and the third provides summary data.

The ten-item workshop questionnaire has been used over the two-year history of the Project. The average rating for the two-year period is 8.4 out of a possible 10. The questionnaire focuses on what people learned, how they felt, and what they liked least and most as well as asking for overall resction based on expectations. More to the point, however, are specific comments from various sessions.



I think it's an excellent manual (the Rich Get Richer . . .)
for any small or medium sized group. You've covered every
area I could think of, and also a few, like church giving,

that I probably wouldn't have thought of! The exercises and role play sessions are ones most agencies should be doing as a matter of course. And some sections have beat out even "the bread game" for entertaining and readable instruction; it was fun to read!"

Your observations are incisive and recommendations are most constructive and often original. . . . we have an excellent melange of hard recommendations to be incorporated in the first draft of the report, currently in development.

The workshop gave me hope that a collective can work/function effectively - that we don't have to keep "mucking along" thinking that all our problems are the inevitable result of being a collective and, therefore, hopeless,

The meeting today gave me a clearer idea of what our agency needs to think about in terms of long-range goals. I have always found it difficult to think of yoals and objectives in an "organizational" manner - now I'm beginning to understand how to break things down to manageable tasks. The fund raising strategy was set out very well. Again, it dealt with breaking something down so that the project is manageable.

Today's session helped to clarify the need to resolve the lack of clarity between the full CMHC board and the program review committee.

Helped me to focus on the parts of the whole picture of looking for monies and approaches to use. Very useful exact information. Helped me with Board of Directors situations.

I received specific names for new sources of information.

... Your continued encouragement to get things down and visualized, i.e., the time, agenda, etc., was probably the most valuable overall suggestion. Another major strength I got from talking with all of you was positive reinforcement for what we had organized up to that point.

I think this session has been incredibly valuable in helping us to assess, objectively, the problems of our organization and possible solutions to these problems.

Your plan and agenda were an excellent continuation of the Development of the Individual as Community Participant workshop which we led in February. This need for motivation came out of those workshops.

What our four-way conversation did for me was put theproblem, possible ways to handle it, and our goals, all in perspective and in one package. Finally, the external evaluation was an intensive investigation into the effectiveness of the Project and involved both questionnaires and interviews. The evaluators report:

Clients have stated that interviews have been successful in raising their awareness, making it possible for them to more clearly articulate concerns and to see those concerns in the context of their organization. Workshops complement this by introducing problem-solving strategies appropriate to the specific issues and concerns of agencies. The workshops are seen as practical and responsive to participant's issues. Individual clients have indicated feelings of increased competency.

Most agencies with which CITP has worked have citizens participating in their activities while the others provide services for citizens. CITP has provided training focused upon increasing skills of agency people working with citizen groups. Those who have worked with CITP feel more able to work more effectively with their clients.

Groups have gained organizational skills as a result of training. They have become increasingly sensitive to group process. They report decision-making has improved as a result of thinking in a systematic manner and have become more issue oriented. One leader stated, "My group feels better about goal-setting and priorities." . .

PROBLEMS AND THEIR RESOLUTION

In the early weeks of the Project's history its staff had to solve, a number of key problems. As with most programs that seek to serve an entire state with limited resources and staff, the question of equitable distribution of services needed to be addressed. Further, as the Project was designed to phase down and out at the end of three years, the question of creating maximum impact and minimal dependency on the part of clients presented a significant challenge.

To solve the first problem, it was necessary to select clients in a systematic, equitable fashion. This was done through the development and implementation of the CITP client selection process. Potential clients were asked to complete a tool for self-diagnosis which is itself a valuable aid to the client organization. The next step is a two-hour interview provided to all potential clients. The interview is actually a consultation session with three representatives of the client organization and two members of the Project staff. The session is intended to help further clarify and diagnose. the group's problems and service needs. For many clients this self-diagnosis and the consulting session provides all the help that is required. Some need additional resources from the CITP library and/or referral to other appropriate resources in the state, and others require more consulting and training services from CITP. If the client requires only one workshop and/or eight more hours of consulting, they are classified as a short-term client and arrangements are made to provide them the needed services. If greater involvement is required on the part of the Project, then the potential client group is rated using the following criteria,

- 1. the client's ability to succeed with the resources they have and the services requested of CITP,
 - 2. alternatives available to the client,
 - geography,
 - 4. ability to pay,
 - 5. the Project's present commitments, and
 - 6. the impact on CITP's work and goals.

Those selected become long-term clients and receive more intensive services from the Project. This process has allowed the Project to provide at least a few hours of service to every client organization requesting help.

CITP resolved the second problem, dependency, by training group members in skills needed to develop and deliver training thereby building greater self-reliance and effectiveness. In most cases, CITP uses people from the agency being served to help plan and develop workshops, and goes one step further, using those people as co-trainers in the workshop. Further, the eight manuals produced by CITP are designed for self-use by agencies. The eighth manual is designed as a trainer of trainers manual, teaching the user how to design and conduct training. It keys into the other seven manuals using their materials, activities, and training exercises. The skills then don't disappear when the consultant walks out the door. The ability to plan, coordinate, and conduct training activities is a valuable body of skills to have within a citizen group. These are key concepts in CITP's approach to training and to the CITP learning model, which is based on the work of John Dewey and Paulo Friere.

CONCLUSION

The concept of training for more effective citizen involvement has been proved through CITP. What remains is dissemination of materials and methods, which is the goal for the third year of the project. College and university continuing education units and Cooperative Extension Services are logical centers at which to base programs of this sort, and interested people are being invited to contact the Division of Continuing Education at the University of Massachusetts at Amherst for assistance in starting their own programs.

Program Name:

ADULT LIFE CYCLE TRAINING WORKSHOPS AND MANUALS FOR KANSAS ADULT EDUCATORS AND COUNSELORS

Name of Principal Forson(s) Responsible for Entry: Vivian Rogers McCoy

Person(s) or Institution to Whom Award Would be Made:

Vivian Rogers McCoy, M. Colleen Ryan, James Lichtenberg Adult Life Resource Center, Div. of Cont. Educ, University of Kansas Source(s) of Funding:

PROGRAM IMPACT Title I, Higher Education Act, 1965 "Community Services and Continuing Education Grant" \$11,578.00 Cost of Program: University of Kansas 7,360.00 \$18,938.00

(All designed and led the workshops and coauthored the training manual/reader.);

Number of Participants in Program:

131 .

Objectives of Program:

To increase the factual knowledge of Kansas adult educators and counselors relevant to the adult life cycle, midlife, and managing stress attending normative change through training in a one-day workshop and/or study of a related training manual/reader:

To increase the knowledge of Kansas adult educators and counselors regarding procedures and techniques which were used to conduct an adult life cycle workshop through training in the workshop and study of the training manual and reader.

Through training in the workshop and study of the training manual and reader to increase in Kansas adult educators and counselors positive attitudes toward 1) the usefulness of the information acquired in teaching adults to cope with developmental tasks and stages of adulthood and 2) the adequacy of the workshop and training manual and reader in preparing the participants and readers to conduct adult life cycle workshops.

To increase the number of adult life cycle workshops/seminars/classes conducted by the trainees and readers in a six-month followup period.

To provide for research and other evaluative procedures to assess the effectiveness of the training workshop and manual/reader.

To make the training available to a larger audience of adult educators and helping professionals beyond Kansas to assist adults to know about their own developmental change and to learn the strategies for dealing satisfactorily with life cycle change.



RATIONALE:

Need for adult life cycle change education: In 1980 the median age for Kansans is projected to be 32.5 (as opposed to 29.6 for the U.S. as a whole). With half the population well into adulthood, Kansas educators and counselors need to be able to help Kansas adults live the latter half of their lives in ways that are productive and personally satisfying.

Recent adult life cycle change research conducted by Roger Gould, Daniel Levinson, and George Vaillant amplifies ways that adults do move constructively through the life span. Their studies indicate that adults typically pass through a series of developmental stages (leaving home, starting family, midlife, reexamination, preparation for retirement, retirement, and disengagement and death) and that each stage requires the adult to engage actively in personal change to guarantee safe passage.

If the challenge to change is misunderstood, stymied, or rejected then the adult experiences confusion and turmoil resulting in behaviors destructive of him/herself and costly to society. That many Kansans do not engage change successfully is clear from the most recent statistics.

In Kansas during 1974 there were 1,414 adults between the ages of 21 and 64 In prison, 11,210 divorces, 303 suicides, 217 people who died of cirrhosis of the liver, 8,318 who died from heart attacks and 2,483 who died from cerebrovascular disease. These statistics have not decreased in 1977-78 but indicated a strong need for trained counselors and educators who can help identify stressors, distinguish avoidable and non-avoidable stressors, identify the locus of control within the individual so that she/he can cope with change, and the normal stress encountered.

Stress management needs: Change, even predictable change, catches many adults off guard both because they are ignorant of the normalcy of

change in their lives and because they are ill-equipped to deal with the stress accompanying change. There are consequences of this lack of preparation.

Dr. Thomas H. Holmes, professor of psychology at the University of Washington, has correlated heart attacks, Americans' number one health problem, and other serious illnesses with the incidence of change and attendant stress in people's lives. Yet, Dr. Layne Longfellow of the Menninger Foundation has said that it is possible and advisable for adults to prepare themselves for the various life stages: "If we know what is coming, we can relax in the face of it and approach it objectively and constructively." Furthermore, Dr. Richard M. Suinm has shown in his Stress Management Training Program at Colorado State University that it is possible to break the vicious cycle of stress through teaching adults to identify sources of stress, to relax, to retrain their reactions to stress and to begin to gain control of their environment.

Adults dissatisfaction with education for life: The best-seller

PASSAGES (Gail Sheehy), which deals with adult life cycle change suggests
that American adults, both those who come to campuses and those to whom
adult educators and counselors reach out in their home communities, wish to
learn to cope with change in their lives. This is further underscored by
the generally low satisfaction (36%) (Gallup Poll November 7, 1976) Americans
feel about their education for life. Preventive adult education about

1) predictable life change; 2) the challenges to be mastered in the developmental
stages; and 3) appropriate coping mechanisms for handling change constructively
could contribute to improving Kansan's education for life.

Critical training needs of adult educators and counselors in area of adult

life cycle change: Few adult educators and counselors in Kansas have had training

related to adult life cycle changes and the methodology for teaching adults to handle life cycle change. (The three professional associations cooperating, in this project had requested workshops on adult life cycle change at their state conventions 1976-77 and their presidents and other professionals sent letters wich attested to the dearth of such training in Kansas. A similar paucity of such training exists also at national level.)

PROGRAM OBJECTIVES:

To increase the factual knowledge of Kansas adult educators and counselors relevant to the adult life cycle, midlife, and managing stress attending normative change through training in a one-day workshop and/or study of a related training manual/reader.

To increase the knowledge of Kansas adult educators and counselors regarding procedures and techniques which were used to conduct an adult life cycle work-shop through training in the workshop and study of the training manual and reader.

Through training in the workshop and study of the training manual and reader to increase in Kansas adult educators and counselors positive attitudes toward 1) the usefulness of the information acquired in teaching adults to cope with developmental tasks and stages of adulthood and 2) the adequacy of the workshop and training manual and reader in preparing the participants and readers to conduct adult life cycle workshops.

To increase the number of adult life cycle workshops/seminars/classes conducted by the trainees and readers in a six-month followup period.

To provide for research and other evaluative procedures to assess the effectiveness of the training workshop and manual/reader.

To make the training available to a larger audience of adult educators and helping professionals beyond Kansas to assist adults to know about their

own developmental change and to learn the strategies for dealing satisfactorily with life cycle change.

CLIENTELE:

| Dem | ographic Summary:* | | Males | 37 | Females 87 |
|----------|--|--------------------|-------|------------------------------------|---|
| (1) | Age: | # () | | • | |
| A | Under 21 21-35 36-55 Over 55 | | | $\frac{\frac{1}{20}}{\frac{1}{2}}$ | $\begin{array}{r} \frac{3}{37} \\ \frac{34}{12} \end{array}$ |
| (2) | Educational Level | | | , E | |
| • | Elementary Junior High School High School College below baccalaureate Baccalaureate Graduate or Professional | | | 4 6 | $ \begin{array}{c c} & 9 \\ \hline & 11 \\ \hline & 25 \\ \hline & 39 \end{array} $ |
| (3) | Occupational Classification |) (5) 1 (1) (1) | | | |
| N | Professional Semi-Professional Skilled | | 3 | 2 | $\begin{array}{r} -68 \\ \hline 14 \\ \hline 3 \end{array}$ |
| · | Semi-Skilled Unskilled Other (specify): students | | 20 1 | 5 - | |

Narrative Description:

The group included teachers, counselors, social workers, nurses, ministers, psychologists, Social Rehabilitation Service staff, hospital administrators, LPNs, secretaries, college faculty and a few upper level personnel managers as well as housewives and students. The group for which the project was intended was identified as adult educators and counselors; the program drew additional populations of professionals and lay persons also asking to be trained.

*39 males and 92 females enrolled. The data here only relate to 37 males and 87 females responding to requests for demographic data. Respondents did not answer items in all categories.



PLANNING EFFORTS:

Planning efforts for the workshops began in fall 1976 when adult life cycle education for the lay public was initiated by ALRC through brown bag luncheon mini-lecture/discussions, one-day workshops, and mini-training workshops for helping professionals at the 1976-77 state conventions of the cooperating professional associations. These associations assisted in the planning and implementation of the grant workshops and participated in them. In addition, ALRC field-tested the grant model in fall, 1977 in Kansas City; the workshop was conducted for helping professionals and ALRC used the evaluations to modify and refine the final grant model. In addition, an advisory panel of faculty involved in adult development, instructional media and evaluation was also used.

SPECIFIC IMPACT ON INDIVIDUALS, INSTITUTIONS, AND COMMUNITY:

A. Description of Program: The Adult Life resource Center, Division of Continuing Education at the University of Kansas requested and received special funding in 1977-78 under Title I of the Higher Education Act of 1965, as amended. The methods of response proposed were: 1) a one-day training workshop on the adult life cycle, stress management, and midlife to be held for adult educators and counselors in Colby, Garden City, Salina, Topeka, Atchison and Fort Scott, and 2) an accompanying training workshop manual.

The program content was divided into three parts: the adult life cycle, midlife, and stress. During the one-day workshop each segment had planned activities of approximately two and one-half hours. In addition, the 250-page Adult Life Cycle Trainer Manual/Reader provided current reprints of research, popular articles, and references to broaden knowledge base.

The principles of adult education were used throughout the workshop.

An adult education rather than therap utic approach was used because 1) the change dealt with is normal change within the expectation of all adults,

2) adults typically experience generational bias against therapy, 3) adults are capable of learning adaptive behavior to cope with change, 4) teaching adults self-management of change makes most efficient-use of educator and counselor resources, 5) andragogy, the art and science of helping adults to learn, stresses experiential learning and intensive adult learner involvement, factors highly conducive to adult learning, and 6) as George Miller, former president of the American Psychological Association, has stated, "Our responsibility is less to assume the role of experts and try to apply psychology ourselves than to give it away to the people who really need it—and that includes everyone."

Specific methods used included:

- a) Audio-experience through sequential tape recordings.
- b) Group discussions.
- c) Dyads-
- d) Orientation/lecture.
- e) Written quizes.
- f) Pre and post tests.
- .g) Reference reading and study.
- h) Large and small group reports.
- i) Stem-completion exercises,
- j) Drawing of individual life charts, value profiles.
- k) Visual stimulation through slide projections.
- 1) Role-playing.
- m) Vaiues clarification exerc ses.
- n) Procedure discussion of human relations exercises which could be used for interpersonal relationships, parenting, family compatibility and conflict, battlegrounds, and work reassessment.
- o) Stressor, and stress identification exercises.
- p) Deep-muscle relaxation exercise.

Materials employed:

- a) Adult Life Cycle Training Manual/Reader
- b) Tape recordings.
- c) Visual art slides.
- d) Transparencies.
- e) Flip charts.
- f) Posters with philosophical, humorous, and artistic themes.
- g) Summary poster-charts.

The use of popular media for background music, instant environment, and discussion stimulus had a purpose. Persons are affected by their environment and they impact on their environment. Living doesn't happen in a vacuum. The designers of the workshops wanted to take advantage of people's association with music and art of their age to help them remember vividly the connected life experiences and to see the bridges that exist between everyone and the world.

B. Impact:

- 1) The training workshops reached 131 adult education/counselor professionals at the skilled, semi-skilled, and graduate student levels. Originally intended for counselors and educators, the workshops also reached social workers, mental health clinic administrators, legal aid, nurses, college administrators, personnel managers, ministers, and housewives, an additional population served in response to requests for inclusion after publicity about the work
- 2) Evaluation by an outside evaluator was done through testing of experimental and control groups (the 1 r only had access to the manual/reader) on a cognitive measure, an affect measure, and a six-month followup questionnaire to determine post-workshop replication of the workshops. Findings reported included the following:
- a) Significant positive gain (at p <.01 level) for both workshop participants and manual/readers on 1) factual knowledge relevant to adult life cycle, midlife, managing stress attending normative change and 2) knowledge of procedures and techniques used to conduct adult life cycle workshops for adults.
- b) Analysis of the affective outcome data showed a significantly higher mean post-test score for the comparison group than for the experimental group. Reading the Adult Life Cycle Training Manual contributed to a more positive attitude toward the adult life cycle information than did the workshop participation. However, the analysis of the affect measures indicated greater variability in attitudes for the experimental group (S = 18.337) than for the comparison group (S = 8.662). Therefore, workshop participants varied greatly in affect toward the workshop some being very positive, others quite negative. The data might suggest that the experiential learning of the workshops more dramatically polarized the participants to both the fears and opportunities of life cycle change.



- c) Workshop participants were asked to respond to the question: Has the workshop experience been useful to you personally? All workshop respondents (100%) said yes.
- d) Workshop participants and control group subjects were mailed a 2-month and 6-month follow-up survey questionnaire to assess the usefulness of the experience. All percentages must be interpreted cautiously as only 48% returned the 2-month and 42% returned the 6-month. However, seven complete workshops were conducted and eighteen more were reported using at least one of the three components (Adult Life Cycle, Midlife, or Stress Management). This supported the intent of the Title I grant to provide training and materials suitable for replication of workshops to the lay public throughout Kansas. Fifty-three percent of those responding after 6 months indicated that they planned to conduct a workshop within the next year.
- 3) Every participant was asked to complete an evaluation at the end of the workshop day. A composite score, based on all evaluations indicated that both phases of the project were successful:

Very High - 1 High - 2 Average - 3

- Low 4 Very Low 5
- e. Overall quality of the program was 1.6.
- b. The quality of the instruction was 1.5.
- c. The quality of supporting materials (handouts, exercises, or films) was 1.3.
- d. The quality of arrangements for my physical comfort was 2.1.
- e. I feel the value I received was 1.6.
- f. Based on this experience, my desire to attend other ALRC programs is 1.7.
- g. My desire to attend a more advanced workshop on this topic is 1.8.
- h. My willingness to recommend this program to others is 1.5.
- I. My willingness to recommend this instructor to others is 1.4.
- 4) By locating workshops in the Kansas cities located in the southeast, southwest, northwest, central, and northwest parts of the stage, the project brought education around adult life cycle change to a broad spectrum of Kansas communities.
- 5) An invaluable outcome of the project is the Adult Life Cycle Training

 Manual/Reader which makes the information available to replicate these workshops

 not only in Kansas but nationwide. To date an additional 700 copies have been

 distributed nationally and in Canada; a second reprinting for further dissemination

 took place in January.

- 6) Unexpected spin-offs have come through additional consultantships and workshop conducted for the Division of Continuing Education, University of Nebraska, Mental Health Centers, Topeka YWCA, The National Association of Counselor Educators and Supervisors, the University of Wisconsin system and Northern Illinois University. Presentations about the project were given at national conventions of the ABE National Advisory Board, and the Adult Education Association, and a summary article on the project appeared in the National University Extension Association Continuum.
- 7) Participant enthusiasm for the project triggered a national conference on THE ADULT LIFE CYCLE: FROM THEORY TO PRACTICE held November 19-21, 1978, at the TWA Breech Academy in Overland Park, Kansas. ALRC conducted the conference with the cooperation of the Adult Education Association and the Association for Humanistic Psychology. Persons involved numbered 180 and came from over 25 states and Canada to continue the thrust of this project—namely to make accessible to practitioners ways to teach adults about their own development and coping strategies to handle adult growth and change with increasing skills and grace. The training project manual/reader was furnished those attending and constituted common background reading. Participant evaluations and those of the leading researchers and practitioners in the field who made major presentations were so laudatory that the University of Kansas and the supporting national associations have agreed to sponsor the conference annually.

PROBLEMS ENCOUNTERED AND SOLUTIONS ATTEMPTED:

Severe weather affected attendance at the February, March workshops.

Aggressive publicity statewide and improved weather contributed to capacity and extended attendance thereafter.



When the leaders found how difficult it was to locate the scattered basic readings in adult life cycle field, the decision was made to add readings to the manual. Appeals had to be made to all holders of copyright to waive reprint fees. This enabled the project expenses to stay within budget despite the broadened publication goal.

Program Name: Nashville HOST Hospitality Training Program

Name of Principal Person(s) Responsible for Entry: C. Edwin LeJeune and John M. Crothers

Person(s) or Institution to Whom Award Would be Made: C. Edwin LeJeune & John M. Crothers or University of Tennessee at Nashville

Source(s) of Funding: Metropolitan Government of Nashville & Davidson County

Cost of Program: \$38,000 for first year

Number of Participants in Program: 6,800

Objectives of Program: The <u>Nashville HOST</u> hospitality training program is the result of a concerted effort by The <u>University</u> of Tennessee at Nashville, the Metropolitan Tourist Commission, and the Nashville Area Chamber of Commerce to develop an educational program for service employees in the hospitality industry who interact daily with tourists.

According to the Copeland Report, commissioned by the Chamber of Commerce, 11 million tourist visit Nashville annually. They are principally attracted by the music industry, primarily to the Grand Ole Opry and Opryland, U.S.A. The vast majority of the tourists and the service employees who welcome the tourists were unaware of most of the city's historical, cultural, and recreational attractions. The principle behind the Nashville Host program is to train the service employees to be more hospitable and more familiar with the Nashville area. Hopefully, then, the average tourist visit of 2.4 nights will be extended. Hence, the theme "one more day" was adopted for the program.

Nashville HOST Hospitality Training Program

(Hospitality Orientation Service Training)

The Nashville Host program is a non-credit continuing education program for adults who work in tourism-related business and public agencies in and around Nashville, Tennessee. The program, unique in the nation, has received excellent cooperation and praise from public officials, businessmen, and university administrators for its timely, relevant solution to an educational need.

The program is the result of a concerted effort by The University of Tennessee at Nashville, the Metropolitan Tourist Commission, and the Nashville Area Chamber of Commerce to develop an educational program for service employees in the hospitality industry who interact daily with tourists.

According to the Copeland Report, commissioned by the Chamber of Commerce, elever million tourists visitNashville annually. They are principally attracted by the music industry, primarily to the Grand Ole Opry and Opryland, US.A. The vast majority of the tourists and the service employes who welcome the tourists were unaware of most of the city's historical, cultural, and recreational attractions. The principle behind the Nashville Host program is to train the service employees to be more hospitable and more familiar with the Nashville area. Hopefully, then, the average tourist visit of 2.4 nights will be extended. Hence, the theme "one more day" was adopted for the program.

In November of 1977, the University received a six-month grant from proceeds of the city's three percent hotel-motel tax. Funding had to be approved by the Metropolitan Tourist Commission, the City Council, and the Mayor. During late 1977 and early 1978, program planning and development began. A director was employed and an advisory committee, representing food service, lodging, commercial entertainment, travel carrier and gasoline distribution interests in the community, was appointed. Two-hour training sessions were agreed upon as the most effective program format. A color videotape was produced, entitled "I Want To See the Manager". The 26-minute tape, which is entertaining as well as instructional, was divided into three sections in order to maximize discussion. Part I, "Tourism is You" (six-minutes) treats the economic impact of tourism on the city; Part II, "Hospitality Is the Challenge" (thirteen-minutes) emphasizes the importance of attitudes in dealing with visitors and illustrates with short sketches first the wrong way and then the right way of treating guests; Part III, "The Right Information" (seven-minutes) demonstrates the importance of having adequate knowledge about the area's history and attractions and of cheerfully sharing that information with the tourists.

The tape was produced by the director of the program with technical assistance from the university's media center. Professional actors from the Nashville Academy Theater were used and a talented filmmaker was employed to direct the entire production.

A durable and attractive pocket-sized directory of Nashville area attractions was also published. This publication, The Nashville Host Green Book, is distributed to each program participant. The handy reference manual contains no advertising, has a map supplement and provides interesting facts about Nashville, as well as accurate descriptions and directions to more than 100 places of interest to visitors. The Green Book is divided into sections, such as general attractions, history-architecture, museums, sports and recreation, etc.

Although some sessions are scheduled at the university, most are scheduled at hotels, restaurants, museums, historic sites, and other locations for the convenience of the employees. Willingness to take the program to the people is one of the principal reasons for its success.

Essential to delivery and training success has been the special presentation of copies of The Green Book and the previewing of "I Want To See the Manager" before industrial and business groups. As top-level industry administrators have learned about the program and have seen the quality of the directory and videotape, their endorsements have been an effective entree to scheduling sessions.

Initially, there was evidence of doubt concerning the ability of the university to effectively relate to the wide variety of service workers. These doubts were removed as soon as the program was taken out into the community. Response from employers and employees alike has been very favorable.

Upon completion of the two-hour training program all participants are given a Nashville Host Membership Card (worth \$60) which provides free admission to fifteen Nashville area attractions. It is believed that service workers' willingness to share information about places to go and things to see is directly related to their own experiences at such places.

The program has been eminently successful, judging from several criteria. More than 6,800 persons have participated, and their responses have been very positive University officials have been very supportive and have used the program as a showpiece to advisory boards and other community groups. The Tourist Commission has twice voted to allocate additional funds for the continuation of the program. Local and national news coverage has greatly assisted in the promotion of the program. Numerous requests for information and assistance have come from communities and universities all across the United States, as well as from two of Canada's provinces.

The program has been shown in several of the Middle Tennessee counties surrounding Nashville, as well as at regional tourism conferences across the state. Spinoff effects have also occurred. Commercials have been produced by local and state tourism groups emphasizing the importance of hospitality to our visitors. Interest is strong in the community and at the university for the beginning of a credit program in tourism education.

"One more day" remains the program theme, and there is an abiding belief that the Nashville HOST program has raised an awareness that visitors are important to the city's way of life.