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ABSTRACT

This manual was developed to upgrade the training design and delivery skills of inservice trainers in the field of alcoholism. It is geared for inservice trainers with little or no formal background in design/delivery of adult education programs, who spend at least 50% of the time in training activities. Contents include: (1) adult learning theory, (2) goal analysis, (3) organizational needs and job analyses, (4) methodology, (5) evaluation design, (6) program implementation, and (7) small group skills. All session outlines provide goals/objectives, time required, equipment and materials needed, primary methods, meeting arrangements, sequence of activities and points for discussion. Appendices include handout information, session assessment form, sample presentation cue cards, answer key and participant final evaluative review. (Author/BMW)

National Institute on Alcohol Abuse and Alcoholism

Trainer Manual

training alcoholism trainers

U. S. Department of Health, Education, and Welfare • Public Health Service • Alcohol, Drug Abuse, and Mental Health Administration

program overview

PURPOSE: The Training Alcoholism Trainers package is designed to develop and/or upgrade the training design and delivery skills of inservice trainers in the field of alcoholism.

AUDIENCE: Inservice trainers with little or no formal background in design/delivery of adult education programs and who spend at least 50 percent of their time in training activities.

TRAINER REQUIREMENTS: Trainers should have a proven track record in conducting inservice training. Trainer should support the basic design and delivery procedures described in the materials.

CONTENT: The content of the course covers:

- Adult learning theory
- Goal analysis
- Organizational needs analysis
- Job analysis
- Performance analysis
- Training group analysis
- Instructional objectives
- Methodology
- Content validation
- Evaluation design
- Program implementation
- Small group skills

COURSE MATERIALS: Training package materials include a trainer manual, participant workbooks, and several additional resource and reference books. (For further information see page 188.)

(continued on inside back cover)

TRAINER MANUAL

Training Alcoholism Trainers

A Program For Trainers In The Field Of Alcoholism

developed by
National Center for Alcohol Education

U.S. Department of Health, Education, and Welfare
Public Health Service
Alcohol, Drug Abuse, and Mental Health Administration

National Institute on Alcohol Abuse and Alcoholism
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Contents

What Training Alcoholism Trainers (TAT) Is All About

A. Overview of the Training Alcoholism Trainers (TAT) Package

NCAE's Training Alcoholism Trainers model is a package designed for people who spend at least half of their time training those who deliver alcoholism services. The purpose of TAT is to help improve trainers' skills in planning and conducting training for service providers in the alcohol field. Trainers in other fields will also find these materials useful in their work.

The program is 40 hours long and consists of 26 sessions, which last from 40 minutes to 2½ hours each. Complete presentation of the program takes 9 full training days. However, individual sessions or various combinations may be used to suit the needs, interests, or time requirements of the participants. The model consists of three components: a Trainer Manual, a Participant Workbook, and Resource Materials.

1. Trainer Manual

This book contains complete instructions and resource references for delivering the TAT program. It provides the following information:

Section I gives details about course content and methodology, the target audience, assumptions about training and trainers, and suggestions for ways of adapting the course to individual needs and preparing to conduct the sessions.

Section II describes how the materials can be shortened and adapted to meet particular needs.

Section III contains instructions and suggestions for conducting individual sessions and for using the materials. This section is intended to be used as a study guide before delivery.

Section IV, the appendixes, contains sample forms and materials that can be used in assessing participant needs and preparing, conducting, and evaluating the program.

2. Participant Workbook

This workbook provides references and handouts used in the preparation and delivery of the training sessions. Each participant should have a copy of the workbook or a copy of the appropriate handout.

3. Resource Materials

Three reference books are used in various sessions of the course. It is recommended that the trainer have a copy of each. It is not necessary for participants to have copies, although this is desirable when possible. A listing of sessions that incorporate these books and information about purchasing them are included in the Appendixes. Other publications cited are optional for the trainer and participants.

The National Center for Alcohol Education (NCAE) developed this **Training Alcoholism Trainers** (TAT) package to provide those responsible for training treatment and prevention workers in the field of alcoholism with an opportunity to deepen their understanding of systematic approaches in designing and delivering training. This course was pilot-tested twice at NCAE with representative trainers from across the country. Following these trials, a revised version was field-tested nationally. The present edition of TAT reflects what NCAE learned about the requirements of trainers in both series of tests.

We feel confident that the model now can meet the needs of participants for whom the materials were prepared. Flexibility has been built into the model to accommodate the time constraints and other special circumstances we observed in the field.

When only adapted portions of the course are conducted, the segments selected should correspond to the felt needs expressed most strongly by participants on the assessment forms in section IV.

Whether conducted in its entirety or in segments, the TAT package can benefit people who:

- train employees delivering direct alcohol-related services;
- possess little or no formal training in design/delivery processes for training adults;
- conduct training as part of their overall job responsibilities; or
- train frequently, but not necessarily full-time.

The recommended number of participants is 16-20. One trainer can manage a group this size for a day or two. We recommend using at least one additional trainer for training that runs for more than 2 days. The recommended training group size divides into four small groups of four or five participants each for practice sessions. A single large room is adequate for the training if it is large enough for four or five groups to talk in conversational tones without distracting each other, but two or three additional break out rooms are desirable.

Like the trainees, trainers delivering this program should be those who regularly conduct training for employees in alcohol-related service agencies as part of their overall job responsibilities. They should support the basic design and delivery procedures described in these materials and should have previously demonstrated some facility in using this material by designing and delivering inservice training in accordance with the TAT approach and techniques. Since the target audience for the program is trainers, the facilitator* should have a proven track record in conducting inservice training programs. Both requirements are important, because the trainer's own presentation of TAT must be congruent with what the package puts forth as good design and delivery techniques to be learned by the participants. Practices that are inconsistent with good training technique will be apparent.

B. The TAT Curriculum

The TAT curriculum is divided into two major units. Unit I presents the fundamentals of designing a training course. Unit II provides instruction and practice in the skills needed to deliver training.

Unit I: Design

Session 1. Orientation and Overview (1 hour)

A get-acquainted exercise is presented, as well as an outline of the overall purpose and content flow of the training program.

Session 2. Basic Assumptions (½ hour)

Participants are exposed to the assumptions about the state of the art of training in the alcoholism field and to the principles of adult education on which the materials are based. These assumptions and principles are made explicit, and participants are given an opportunity to examine and react to them.

Session 3. Design Task Assignment (2 hours)

Participants develop their own 10-hour training events. All conditions and options for completion are outlined. A Training Event Planning Guide (TEPG) is described and analyzed to provide participants with a process for completing their tasks. The task requires practice in the six basic skill areas of TAT: (1) conducting a needs assessment, (2) analyzing a training group, (3) formulating appropriate outcomes, (4) devising an instructional strategy, (5) developing effective methodologies, and (6) planning for evaluation and feedback.

Session 4. Goal Analysis (1 hour)

Participants improve and refine their knowledge and skills in order to distinguish between clear and fuzzy goals. This session's work will prepare them to examine the needs of the organization in which they work.

*The terms facilitator and trainer are used interchangeably throughout this manual.

Session 5. Organization Needs Analysis (1 hour)

Participants learn the first step in training needs assessment. They identify organizational needs by comparing the goals of an organization to the functions actually carried out by the staff. They examine these organizational needs and identify those that can be met by training.

Session 6. Job Analysis (1 hour)

Step 2 in doing a needs assessment. Participants define the minimum level of competency required to get a job done—minimum job expectations.

Session 7. Organizing Design Resource Groups (1 hour)

Participants organize into groups to assist individual members in completing training design tasks. They work together in beginning the task by assessing their personal strengths and weaknesses in each of the six areas mentioned under session 3.

Session 8. Performance Analysis I: Introduction (½ hour)

Participants are introduced to a performance analysis process and learn how to derive an individual's job-related needs by comparing current performance to minimum job expectations.

Session 9. Performance Analysis II: Questionnaire (1 hour)

Participants learn how to construct a questionnaire for use in analyzing job performance.

Session 10. Performance Analysis III: Interviewing (2 hours)

The theory and techniques of interviewing as a tool in conducting a job performance analysis are presented.

Session 11. Training Group Analysis (1½ hours)

An exercise in the development of selection criteria for participants in training groups is described. Advantages and disadvantages of training population variables are discussed.

Session 12. Instructional Objectives (1 hour)

Participants complete exercises designed to sharpen the knowledge and skills necessary for distinguishing between correctly and incorrectly stated instructional objectives.

Session 13. Adult Learning Theory (1½ hours)

Principles of adult education are examined and practiced. Participants compare their personal learning habits to four characteristics of adult learners: self-concept, accumulated experience, readiness to learn, and problem-centered orientation to learning.

Session 14. Methodology I (2 hours)

An overview of the field of adult training methods and techniques is presented. A bibliography is supplied.

Session 15. Methodology II (1½ hours)

The principles of training design are illustrated with specific techniques, including lecture, demonstration, role play, creative thinking, and listening group.

Session 16. Methodology III (1 hour)

Trainees are given model learning activities as samples and are asked to analyze their component parts.

Session 17. Content Validation (1 hour)

Participants become familiar with a process for determining the validity of the content of a session.

Session 18. Design Task Evaluation I (3 hours)

Participants review and apply a predesigned rating formula to a colleague's completed Training Event Planning Guide (TEPG) for a 10-hour training event.

Session 19. Design Task Evaluation II (1½ hours)

Strengths and weaknesses of training events designed by individual trainees are analyzed by the total group of participants.

Unit II: Delivery

Session 20. Delivery Stage: Overview/Task Assignment (6½ hours)

Each participant delivers a 20-minute training session to the group. Requirements and options for this task are outlined. The method and structure for evaluating the participants' presentations are described. (Preparation time for delivery task is included.)

Session 21. Physical Learning Climate (1 hour)

Participants review two sample training event checklists and identify significant items for their own training situations. They construct a physical learning climate checklist for future use in their own training environments.

Session 22. Psychological Learning Climate (1 hour)

The appropriate degree of trust and intimacy in a learning group is examined in relation to training objectives.

Session 23. Feedback I (40 minutes)

Participants perform exercises in giving and receiving feedback on three variables: observation, inference, and feeling.

Session 24. Feedback II (1½ hours)

Participants demonstrate their understanding of the principles of feedback by constructing short dramatizations.

Session 25. Small Group Skills (2½ hours)

Participants learn one model for analyzing group process. Exercises focus on the when, who, and why of group process interventions.

Session 26. Delivery Task Presentation and Evaluation (40 minutes per participant)

Participants deliver their own learning activities and evaluate presentations by others.

C. Evaluation Instruments

Copies of all of the evaluation instruments administered to participants during course development are contained in section IV. To make additional copies, detach these pages and duplicate them or retype them from the manual and then duplicate. Each instrument is discussed briefly here.

1. Pre/Post Cognitive Test

This instrument is designed to measure the cognitive gains that occurred over the course. It can be administered to all participants before the training course and again as the last activity of the course. In order for this to be as accurate a gage of growth as possible, it is imperative that facilitators cover, during instruction, all the major points listed in the session outlines.

2. Postsession Rating Form

This form invites comment from participants on the utility, effectiveness, and clarity of the delivery of a particular session. It asks them to rate the relevance of the material to their needs and to make suggestions for improvement. One item relates to the effectiveness of the facilitator. It is suggested that this form be used *only* for sessions of particular interest to the facilitator. The rating form may be alternated with debriefing sessions to give the facilitator oral feedback on participants' reactions to the course. A few minutes at the end of the selected session should be allowed for completion of the form.

3. **Debriefing Guidelines**

The questions guide the facilitator in conducting a short, informal meeting with selected participants about the progress of the course.

4. **Final Evaluative Review**

The instrument provides for an assessment of the participants' perceptions of the relevance and utility of the entire training course and their overall reaction to it. It is administered at the end of the entire course.

D. Design Assumptions About Training and Trainers

NCAE developed these materials based on a number of assumptions about "good training" and "good trainers."

1. Good training accommodates adults who are:
   - independent,
   - experienced,
   - problem-centered, and
   - "now"-oriented.
2. Good training, therefore, is:
   - self-directed (the learner is involved in conducting the learning experience),
   - experienced-based (learning activities are planned around the participant's experiences),
   - problem-centered (learning centers on learner needs/problems, not on "covering" subjects), and
   - immediate in application (learning can be put directly into action).
3. A good trainer *plans* the event by:
   - laying out overall training goal(s);
   - deciding who will attend (recruitment and selection procedures);
   - assessing funding sources and costs to participants and assigning responsibility for finances;
   - setting the timespan for training in light of costs, participants' needs and availability, and trainer capability;
   - determining those strongly felt needs of participants that can realistically be met within time limitations;

- adapting the materials to focus on these particular participant needs (suggestions about adapting the materials are given in section II);
- attending to the logistical needs of participants (food, lodging, travel, etc.);
- arranging for adequate training facilities;
- acquiring and testing required instructional equipment;
- engaging the group facilitators and content specialists needed to conduct the training; and
- coordinating the management and delivery activities of everyone involved in planning and running the training program.

4. A good trainer *prepares*.
5. A good trainer *facilitates learning* by:
   - helping people feel comfortable;
   - creating a healthy learning atmosphere;
   - being supportive and respectful, not judgmental;
   - being aware of his/her own biases;
   - giving participants some rein;
   - focusing on participants' problems;
   - drawing on participants' experiences;
   - providing practice in applying learning;
   - keeping a finger on the pulse of the group and individuals within it;
   - dealing effectively with participants who display behaviors that can impede group work or obstruct learning;
   - surfacing and addressing the underlying problems of the entire group or of subgroups when they adversely affect program progress; and
   - being a good training team member.

E. How to Prepare to Run TAT

To prepare for the course as a whole or in various session combinations, the facilitator should:

- Review package contents.
- Read sections I and II carefully.
- Apply suggestions on adaptation and select training focus.

To prepare for each individual training session in section III, it is suggested that the facilitator:

- Review the summary page and determine the relationship of the objectives of the session to the previous session and to the overall course.
- Review the sequence of activities, the discussion points, and the materials several times before the session to become thoroughly familiar with the session and its content.
- *Make cue cards for use in the session.* The materials were designed for preparation, *not* for delivery. Trainers are strongly encouraged to put presentation materials into their own words and determine the amount of detailed instruction they personally need. Trainers should use their *Trainer Manual* for quick reference during group work and breaks (see sample cue card in appendixes).
- Doublecheck to see that all the materials, equipment, and furniture listed on the summary page are prepared or obtained.
- Use flip charts, which may easily be made by writing or drawing with markers on large-sized paper. If a tripod is not available, flip charts can be taped or tacked to the wall. A chalkboard and chalk may be used instead.
- Make sure needed audiovisual equipment will be available and operational when needed. If the facilitator is to operate the equipment *he/she must know how* beforehand.
- Rehearse the presentation ahead of time as if the group were present. Once the facilitator is sufficiently familiar with the workshop contents and background material and has prepared his/her notes and key questions, a final preparation step is to enlist a coworker, friend, or family member to act as participant-audience and run through all the sessions as in an actual workshop. An audience of one or two is not the same as a roomful of participants, but this exercise will give the facilitator a feel for the flow of the activities, the pace and structure of the workshop, and the use of the session cue cards. If no one is available to serve as audience or the facilitator is uncomfortable with this arrangement he/she should at least go through the sessions step-by-step by himself/herself.
- Review cue cards (or make them up) the evening before delivering the session.
- Check the operation and placement of equipment, arrange materials and furniture as necessary, and review cue cards one more time before each session and before arrival of the participants.

How to Adapt TAT to Meet Particular Requirements

The sessions in this course were constructed to be used in sequence over a 9-day period. However, they can also be conducted at spaced intervals. Units I and II each are self-contained and can be conducted separately without great difficulty. In addition, a number of sessions can be put together and used as independent units or minicourses that run for 1 or 2 days. And, as we will see further on, certain sessions within either unit can stand alone.

A. Combining Sessions into Minicourses

In circumstances where it is not feasible to present the entire TAT model, or to conduct either unit I or unit II in its entirety, the facilitator can present minicourses that consist of sessions assembled in various combinations to address these broad training issues:

- How do we determine which of our agency's problems can be solved through training?—Minicourse A: Assessing Organizational Training Needs.
- How do we determine the kinds of training our staff needs?—Minicourse B: Assessing Individual Training Needs.
- What can we expect to get out of training that meets the needs of the agency and the individual?—Minicourse C: Defining Training Outcomes.
- What goes into training to make it both productive and engaging?—Minicourse D: Adult Education Theory and Techniques.
- How do we handle people in a training situation?—Minicourse E: Training Group Discussion Leader.

The sessions that make up each minicourse have been combined to permit the facilitator to lead the participants to a resolution of these issues in a reliable and methodical way. Included in the description of each minicourse are suggestions for adapting the materials specifically for this kind of use by making alterations in the manner of presentation of the individual sessions in the course. These adaptation recommendations refer to the actual outlines contained in section III of the *Trainer Manual*. The recommendations are given here as part of the treatment on adapting TAT to meet particular requirements. A clear understanding of them will require that the facilitator first study section III, Session Outlines.

1. Minicourse A: Assessing Organizational Training Needs

Minicourse A is composed of:

Session 2—Basic Assumptions
Session 3—Design Task Assignment
Session 4—Goal Analysis.

It is a 1-day course that should be ideal for alcoholism workers (especially managers or those in a position to influence managers) responsible for identifying the organizational needs of an agency that can be met through training.

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The following adaptations are recommended for minicourse A:

- Begin the course with a modified version of the Introduction and Welcome (session 1) or a substitute warmup exercise. Tailor the remarks to the group. Provide nametags only if necessary. State that the purpose of the initial exercise is to compare the participants' expectations with the objectives of the minicourse. Carry out activity C, the Introductory Activity; instruct participants to focus on each others' expectations of training in the course.
- Summarize the objectives of sessions 2, 3, and 4 on newsprint, the blackboard, or a transparency. Compare participants' expectations with what will be covered. Make sure participants understand which expectations will and will not be addressed.
- In session 2, Basic Assumptions, the Opening Remarks emphasize assumptions about training that must be examined if one is to decide which organizational needs will and which will not be responsive to a training solution. In F, Closing Remarks, substitute the following for numbers 1 and 2: "Participants need to have these assumptions in mind when they examine organizational needs for training."
- In session 3, Design Task Assignment, for A, Opening Remarks, substitute: "The purpose of the session is to enable participants to understand and apply the organizational goal analysis section of the Training Event Planning Guide (TEPG) in the Participant Workbook." Skip section B, include C. Modify the task by instructing participants to read only the pages headed Organization Goal Analysis of the TEPG and prepare clarifying questions for that section. The rest of D can be used, but, again, only with those pages of TEPG.

  Instead of E, which is dropped, assigned groups are to work through all of the questions for *one* agency and identify problems they are having in carrying out the process. Once the large group is reconvened, discussion centers on solutions to identified problems. Conclude the session with a brief walk-through of major section headings of the TEPG so that participants get a bird's-eye view of how one would translate organizational needs into training designs.

2. Minicourse B: Assessing Individual Training Needs

Minicourse B consists of:

Session 6—Job Analysis
Session 8—Performance Analysis I
Session 9—Performance Analysis II
Session 10—Performance Analysis III.

This is a 1-day program that can help an agency define training needs of individual staff members.

A number of items are to be kept in mind by those using minicourse B:

- The first adaptation recommended for minicourse A applies as well to this course and to all the other minicourses described in this section.
- Session 7 is omitted; it is not part of this course.
- The final session can be concluded with a brief summary of the points made under session 11, B, Training Group Composition, Lecture and Discussion.
- If time allows, the facilitator may wish to take a quick walk-through of the rest of the TEPG to give participants a feel for what happens to the data derived from job and performance analyses.
- If session 11 is added to minicourse B, the resulting variation could fit into the 1-day schedule. (This version would provide participants with the skills to select a training focus responsive to staff needs within the context of organizational goals.)
- If sessions 11 and 12 were to be added to minicourse B, participants would learn how to translate training needs into specific learning outcomes, and all six sessions could still be completed in 1 day.

3. Minicourse C: Defining Training Outcomes

Minicourse C is essentially a combination of courses A and B. It is composed of:

Session 2—Basic Assumptions
Session 3—Design Task Assignment
Session 4—Goal Analysis
Session 6—Job Analysis
Session 8—Performance Analysis I
Session 9—Performance Analysis II
Session 10—Performance Analysis III
Session 11—Training Group Analysis
Session 12—Instructional Objectives

This course can be conducted in 2 days. While combining two prior courses, it can, in turn, be joined with subsequent minicourses, depending on available time and participants' needs. For example, Minicourses C and D can be combined to create a 4-day course on designing educational experiences for adult learners.

4. Minicourse D: Adult Education Theory and Techniques.

Minicourse D is a 1-day course consisting of:

Session 13—Adult Learning Theory
Session 14—Methodology I
Session 15—Methodology II
Session 16—Methodology III.

Sessions 13 through 15 can be presented as part of this course without modification. However, participants who have not gone through earlier portions of TAT will not be familiar with the Training Event Planning Guide. Therefore, in using session 16, the facilitator will have to explain the major headings of TEPG before asking participants to compare items in the Model Learning Activity (handout 1) with the ideal components on page 23 of the TEPG. (Participants need only page 30 of the guide.)

Sessions 17, 18, and 19 can form a 1-day training program on how to evaluate training events. However, since much of what is covered in these sessions depends on an understanding of the materials in the previous sessions, we do *not* recommend their combined use except with participants who are well acquainted with the prior content. The first 19 sessions, which comprise unit I of TAT, provide a 7-day course on the major aspects of training design.

Unit II of TAT, Delivery of Training, takes 2 full days. Since the subject is particularly important and the materials require no major changes, only one minicourse configuration is recommended.

5. Minicourse E: Small Group Discussion Leader

This 1-day course consists of:

Session 22—Psychological Learning Climate
Session 23—Feedback I
Session 24—Feedback II
Session 25—Small Group Skills.

This minicourse provides information about how to observe and influence the dynamics of adult learning groups. Session 22 may be too fundamental for trainers who are already familiar with group dynamics theory. It can be abbreviated

Session	Expected Outcome	Recommendations for Adaptation	Time (hours)
2. Basic Assumptions	Understand the basic principles underlying education and adult learning.	Focus on the opening presentation and the use of handout 1 and reference 1 in the second set of assumptions. Skip the first set (unless you have a special reason to include it).	¾
3. Goal Analysis	Know characteristics of clear and adequate outcome statements.	Read Mager's *Goal Analysis*[1] in preparation. You may want to give participants a chance to formulate and critique goal statements.	1
12. Instructional Objectives	Formulate specific learner outcome statements.	Should work as is. Mager's *Preparing Instructional Objectives*[2] should contain answers to participants' questions.	1

[1] Robert F. Mager, *Goal Analysis.* (Belmont, Calif.: Fearon Publishers, 1972).
[2] Robert F. Mager, *Preparing Instructional Objectives.* (Belmont, Calif.: Fearon Publishers, 1971).

and presented as a brief review to such trainers at the beginning of session 23. Sessions 23-25 are suitable both for starting trainers who are learning these skills for the first time and for experienced trainers who wish to fine-tune them through practice.

B. Using Individual Sessions

Some individual sessions can stand alone. These are listed in the table that follows, which gives the number and name of each session, what participants will gain from it, brief adaptation recommendations, and the time needed to conduct each session.

The assessment instruments and tabulation forms in Section IV can be used by the trainer to find out which minicourse or session(s) his/her prospective trainees would like to cover.

The content and methodology of other sessions can be used alone or in combination by the resourseful facilitator in creative ways that serve his/her own training situation.

Session	Expected Outcome	Recommendations for Adaptation	Time (hours)
13. Adult Learning Theory	Understand Malcolm Knowles' analysis of four basic adult qualities that affect adult learning.	You might want to follow up with sessions 14, 15, and/or 16 at a later date. The four combined constitute minicourse D. Session 13 requires no changes when used alone.	1½
22. Psychological Learning Climate	Describe climate that fosters learning.	Use as is.	1½
23. Feedback I	Know ground rules for giving feedback.	Use as is.	¾
24. Feedback II	Gain skill in giving constructive feedback through practice of ground rules.	Use as is.	1½
25. Small Group Skills	Use model for analyzing what is going on in a group.	Use as is.	2½

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Session Outlines

Program Goals

Participants will understand and apply the fundamental skills needed to

- design inservice alcoholism training and
- deliver inservice alcoholism training.

They will demonstrate their design competencies by preparing and analyzing written training plans for specific target groups in accordance with a systematic design process (unit I).

They will demonstrate their delivery capabilities by delivering and analyzing learning experiences in accordance with principles governing the selection and use of training methods for adult learners (unit II).

REMINDER: section III is intended for the trainer's use in preparing to deliver a session. Trainers should make their own presentation cue cards as they prepare. (See example on page 200.)

In using the Session Outlines, please note that the first page, or cover sheet, for each session indicates the session goals and objectives, total session time required, equipment, materials, primary training methods, and meeting room arrangements. The subsequent pages should be read across the double page. The lefthand page specifies suggested times for each activity, the sequence of activities, and materials needed for that activity. The righthand page outlines the points for discussion corresponding to the activity described opposite.

Session 1 — Orientation and Overview

GOALS/OBJECTIVES: The goals of this session are to:

1. establish an atmosphere conducive to learning,
2. familiarize participants with goals of the training program, and
3. familiarize the participants with the sequence of activities of the training program.

At the end of the session the participants will be able to:

1. identify correctly by name at least half of the other members of the training group and of the training staff,
2. distinguish between the design and delivery skills goals, and
3. relate the two goals to the overall training program sequence of events.

TIME REQUIRED: 1¼ hours

EQUIPMENT: Flip chart paper, tripod, masking tape or tacks, markers, name tags, pens or pencils, writing paper, notebooks

MATERIALS: (Handouts and references are found in the Participant Workbook.) Handout 1, Glossary

PRIMARY METHODS: Lecture, discussion, group exercise

MEETING ARRANGEMENTS: Drawing 1, Round table setup

Drawing 6, Informal discussion setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 1

Time	Sequence of Activities	Materials
5 min.	A. Introduction and Welcome 1. Tailor welcoming remarks to the particular audience and situation. 2. Be sure to have name tags and other materials listed opposite ready for distribution.	A2. Name tags, handouts, pens, pencils, paper
5 min.	B. Opening Remarks 1. State purposes of this session. 2. State sequence of activities.	
	C. Introductory Activity	
5 min.	1. Introduce training staff and clerical or support personnel who will have contact with the trainees.	
40 min.	2. Trainee introduction exercise. a. Divide trainees into pairs. b. Instruct trainees to: (1) interview each other for personal data (i.e., where from, kind of work, etc.), (2) describe to their partners a recent successful training experience, and (3) describe to their partners a training skill that each would like to acquire. c. Allow 15 minutes for interviews. d. Reconvene full group and ask each trainee to: (1) introduce his or her partner and (2) report on knowledge gained in the interview.	

Points for Discussion

A. Introduction and Welcome

There are no discussion points for this section.

B. Opening Remarks

1. The purposes of this session are:
   a. to acquaint the trainees with the overall design of the training program,
   b. to introduce the trainers to the trainees, and
   c. to introduce the trainees to each other.
2. During this session there will be:
   a. introductory activities,
   b. a break, and
   c. a brief overview on the content of the training course.

C. Introductory Activity

There are no discussion points for this section.

Session 1

Time	Sequence of Activities	Materials
15 min.	D. Overview of Training Program	
	1. State goals of training program.	
	2. Describe focus of training program.	
	3. Review sequence of activities.	

Points for Discussion

D. Overview of Training Program

1. This training program is designed to achieve three major goals:
   a. Total seminar goal—Participants will demonstrate competency in understanding and applying the fundamental skills needed to design and deliver training programs to adults.
   b. Design skills goal—Participants will demonstrate their competency in understanding and applying the elements of a systematic design process by preparing and analyzing written training plans for specific target groups.
   c. Delivery skills goal—Participants will demonstrate competency in understanding the principles for selecting and facilitating training methods appropriate to the special learning characteristics of adults by delivering and analyzing specific learning exercises.
2. The program will focus on the adult learning process. Four factors influence that process:
   a. the learner,
   b. the environment,
   c. the methodology, and
   d. the trainer.
3. The focus during the first week will be on the learner and the methodology. Subjects will be:
   a. understanding the adult as a learner,
   b. assessing the training needs of the adult learner, and
   c. constructing learning activities to meet those needs.

   The sequence on instruction will be as follows:
   a. Needs Assessment:
      (1) needs of the organization,
      (2) needs of the job,
      (3) needs of the worker, and
      (4) selection of a training group.
   b. Building a Curriculum:
      (1) deciding learning outcomes,
      (2) constructing learning activities, and
      (3) selecting evaluation strategy.

Time	Sequence of Activities	Materials
	D. (continued)	
5 min.	E. Closing Remarks 1. Have participants locate handout 1 for this session in workbooks. a. State purpose of Glossary. b. Ask trainees to read Glossary on their own time and note any questions they may have. All questions will be answered in the first content session. 2. Link to first content session.	E1. Handout 1, Glossary

Points for Discussion

D. (continued)

4. The focus during the second week will be on the trainer and the environment. Subjects will be:
   a. The training environment:
      (1) physical environment and
      (2) psychological environment.
   b. The trainer:
      (1) small-group discussion and
      (2) large-audience presentation.

5. Each week there will be an individual project for trainees to work on:
   a. Week 1: Preparation of a written plan for a training event and
   b. Week 2: Delivery of a 20-minute training session.

E. Closing Remarks

1a. The purpose of the Glossary is to acquaint the trainees with some words that have meanings specific to this training course.

2. The first content session of the training program will introduce the trainees to the basic assumptions upon which the course is built and which are essential for the understanding of the subject areas that will be covered in the course.

GOALS/OBJECTIVES: The goals of this session are to:

1. familiarize the participants with the basic assumptions that underlie the method of training being used in TAT,
2. persuade the participants to accept these basic assumptions for the purposes of the course, and,
3. make sure that participants understand the Glossary introduced in the orientation session.

At the end of the session participants will:

1. be able to name three of the underlying assumptions and
2. be able to relate one type of assumption to personal experience.

TIME REQUIRED: 1¼ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Basic Assumptions

Reference 1, Discussion Task Instructions (for flip chart 1)

Glossary (introduced in session I)

PRIMARY METHODS: Lecture, small group discussion, panel discussion

MEETING ARRANGEMENTS:

Drawing 6, Informal discussion setup

Drawing 4, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

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Session 2

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks State purpose of this session.	
5 min.	B. The Basic Assumptions 1. Refer participants to handout 1—Basic Assumptions. 2. Review basic assumptions.	B1. Handout 1, Basic Assumptions
30 min.	C. Small Group Discussion 1. Divide trainees into groups of four or five. 2. Using reference 1 and flip charts with tasks written out, instruct groups to: a. share with each other their experience of a concrete example of one or more of the assumptions and b. select a spokesperson to represent the group in the panel discussion that follows. 3. Check group selections to make sure both types of assumptions are being discussed. 4. Circulate among groups during discussion to keep group activity ontrack.	C2. Reference 1, Discussion Task Instructions (for flip chart 1)
25 min.	D. Panel Discussion 1. Form a panel consisting of chairpersons of each group, with the trainer as moderator. 2. Seat panel together at head of room. 3. Have panel members discuss results of their small group activities. Bring out the teaching points listed on the opposite page.	

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Points for Discussion

A. Opening Remarks

The purpose of this session is to familiarize trainees with the rationale that underlies the form and content of this training program.

B. The Basic Assumptions

2. There are two kinds of basic assumptions to be considered:
   a. assumptions about the present state of the art of training in the field of alcoholism and
   b. assumptions about adult education in general.

C. Small Group Discussion

The purpose of the discussion is to give participants an opportunity to express their opinions about the relevance of this workshop for them.

D. Panel Discussion

3. Lead question: What did you hear in your group?

   Teaching points:

   - There is a distinction between behavior and attitude. To change behavior, it may be necessary first to alter underlying attitudes.
   - The role of the trainer is to be a facilitator rather than a lecturer.
   - Evaluation and feedback at predetermined intervals are essential to training.

Session 2

Time	Sequence of Activities	Materials
10 min.	E. Questions and Answer—Glossary	
	1. Ask trainees to turn to the Glossary introduced in previous session.	
	2. Review important definitions (see opposite).	
	3. Answer questions.	
2 min.	F. Closing Remarks	
	1. Summarize discussion of basic assumptions.	
	2. Link to next session.	

Points for Discussion

E. Question and Answer—Glossary

2. The definitions given in the Glossary are derived from the basic assumptions just studied. Important definitions to remember are:

   Learner. The person for whom the training activity is created and presented. Ideally, his or her behavior reflects commitment to the following assumptions:

   - No one can motivate, teach, or train someone else: all individuals conduct their own motivating and their own learning. Hence, all learners are responsible for the degree to which they involve themselves in the learning activity.
   - The learner is in charge of what he or she gives to and gets from others in the group.
   - Learners have the obligation to help the staff help them reach their learning goals. This can only happen in accordance with the degree to which they take their learning seriously. The learners' feedback to the trainer is essential to keep a course relevant to their learning needs.

   Trainer. A guide who arranges learning experiences for others. Ideally, his or her behavior reflects commitment to the following assumptions:

   - The trainer can only guide learning, not create it.
   - A trainer doesn't train until he or she locates a specific need, just as a dentist doesn't drill until he or she finds a specific cavity.
   - The more a trainer knows and accepts his or her personal needs and behavior styles, the freer he or she is to help trainees in identifying their needs and behaviors.
   - Neither the learner nor the trainer is on trial; evaluation is conducted to measure the usefulness of the total training activity.
   - The more knowledge and strategy a trainer possesses, the more closely he or she can match useful instructional activities with specific learning objectives and individual learning needs.
   - The trainer is at all times a learner as well as a facilitator, learning from each person and each training experience.

   Learning. A relatively permanent change in a person's overt or covert behavior, which is not a result of normal maturation. The evidence for learning, which is an internal process, is behavior change, which can be observed. We infer that learning has occurred from the change in behavior.

F. Closing Remarks

1. Trainees will have the opportunity to see the basic assumptions in operation during the rest of the training course.
2. Trainees will also be able to make use of the assumptions while writing their own design task, which will be explained fully in the next session.

GOALS/OBJECTIVES: The goals of this session are to:

1. clarify the design task assignment for the trainees and
2. familiarize the trainees with the Training Event Planning Guide (TEPG) and the planning steps it sets forth.

At the end of the session the trainees will be able to:

1. name the design task stages and
2. explain the three discrete steps within each stage of the TEPG planning process.

TIME REQUIRED: 2 hours

EQUIPMENT: Flip chart paper, tripod, masking tape or tacks, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Design Task Instructions

Handout 2, Training Event Planning Guide (TEPG)

Reference 1, Design Task Stages (for flip chart 1)

PRIMARY METHODS: Lecture, discussion, small group activity

MEETING ARRANGEMENTS:

Drawing 6, Informal Discussion setup

Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 3

Time	Sequence of Activities	Materials
5 min.	A. Opening Remarks	
	1. State purposes of this session.	
	2. State sequence of activities.	
5 min.	B. Stages of the Design Task	
	1. Describe the design task.	
	2. Review the three stages of the design task (see opposite).	B2. Reference 1, Design Task Stages (for flip chart 1)
	3. Clarify stage I:	
	a. Refer participants to handout 1, Design Task Instructions.	B3a. Handout 1, Design Task Instructions
	b. Review the instructions.	
	c. Answer questions.	
5 min.	C. Use of the Training Event Planning Guide (TEPG)	
	1. Refer participants to handout 2, TEPG—and allow a few moments for trainees to look it over.	C1. Handout 2, TEPG
	2. Discuss purpose and format of TEPG (see opposite), but postpone questions at this time.	

Points for Discussion

A. Opening Remarks

1. The purposes of this session are to:

   a. make the design task assignment clear to the trainees; and

   b. introduce the trainees to a planning instrument, the Training Event Planning Guide (TEPG), and to make sure the trainees understand its purpose and how to use it.

2. During this session the trainees will:

   a. go over the design task assignment and

   b. examine the TEPG in detail.

B. Stages of the Design Task

1. The task for trainees during the first week is to design a complete training event of at least 10 hours in length.

2. The task will be accomplished in three stages:

   a. Stage I—The design itself. During the first stage each trainee will design a complete training event.

   b. Stage II—The first evaluation stage. Each trainee's design task will be evaluated intensively by another trainee.

   c. Stage III—The second evaluation stage. Particular aspects of the design tasks will be discussed and evaluated by the full group.

C. Use of the Training Event Planning Guide (TEPG)

2a. The Training Event Planning Guide is a series of worksheets designed to focus attention on each sequential step of the planning process. Its purpose is to insure that all necessary steps are taken in logical order.

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Time	Sequence of Activities	Materials
	C2. (continued)	
	3. Assign participants to groups of three.	
10 min.	D. Clarification of Needs Assessment Section	
	1. Understanding the section:	
	a. Instruct trainees to form the assigned groups and take 10 minutes to read the Needs Assessment section and prepare clarifying questions.	
15 min.	b. Reconvene full session and answer questions.	
15 min.	2. Applying the section:	
	a. Instruct trainees to re-form groups and take 15 minutes to discuss what each of the three planning steps means to them. Ask them to note any recent experiences in one of those three areas.	
10 min.	b. Reconvene full session and discuss some of the small group experiences.	

Points for Discussion

C2. (continued)

b. The TEPG is laid out in two major sections:

(1) the Needs Assessment section, which concentrates on determining the needs that must be satisfied by the training activity, and

(2) the Curriculum Building section, which will serve as a roadmap for developing the learning activities that make up the design task.

2c. In general the format of the TEPG follows both

(1) the curriculum of this course and

(2) the sequence for developing any training event.

d. The trainees should find that as they learn a new skill they will be at the point in their design task where they need to make use of that skill and will be up to the appropriate page in the TEPG.

e. The TEPG is designed primarily for inservice training; not all of the pages will be directly applicable to all training situations.

f. Structural points to bring out:

(1) The booklet is organized into two sections.

(2) There are three principal stages in each section.

(3) These six stages are the major design categories and are the six skill areas TAT is focused on.

g. Review the 12 steps in the TEPG sequence and examine the structure of several pages.

D. Clarification of Needs Assessment Section

There are no discussion points for this section.

Session 3

Time	Sequence of Activities	Materials
	E. Clarification of Curriculum Building Section	
10 min.	1. Understanding the section:	
	a. Instruct trainees to re-form groups and take 10 minutes to read the Curriculum Building section and prepare clarifying questions.	
15 min.	b. Reconvene full session and answer questions.	
	2. Applying the section:	
15 min.	a. Instruct trainees to re-form groups and take 15 minutes to discuss what each of the three planning steps means to them. Ask what special difficulties they foresee in completing these sections.	
10 min.	b. Reconvene full session and discuss some of the difficulties mentioned.	
5 min.	F. Closing Remarks	
	1. Announce design task schedule (see opposite).	
	2. Anticipate next session.	

Points for Discussion

E. **Clarification of Curriculum Building Section**

There are no discussion points for this section.

F. **Closing Remarks**

1. Design task schedule:
   a. A full training day will be devoted to both evaluation stages for the task.
   b. To allow trainees sufficient time to complete their tasks, work sessions will be scheduled each day throughout the workshop.
   c. There will be checkpoint sessions periodically to deal with any special problems that may arise.
   d. Resource groups to help participants with their tasks will be formed.
2. The first step in designing any training event is to identify and analyze the goals of the event. The next session will examine the subject of goal analysis in detail.

GOALS/OBJECTIVES:	Participants will refine and improve existing knowledge and skills necessary to identify clearly stated goals. Given a list of 20 goal statements, participants will be able to judge correctly whether 17 meet criteria for clearly stated goals.
TIME REQUIRED:	1 hour
EQUIPMENT:	Flip chart paper, tripod or masking tape, markers
MATERIALS: (Handouts and references are found in the Participant Workbook.)	Handout 1, Goal Statements Resource Material, *Goal Analysis* by Robert F. Mager Flip chart 1, Goal Analysis (to be prepared based on discussion points listed under section A) Flip chart 2, Elements of a Goal Statement (to be prepared based on discussion points listed under section C)
PRIMARY METHODS:	Lecture, individual task, large group discussion
MEETING ARRANGEMENTS:	Drawing 3, Classroom setup (See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 4

Time	Sequence of Activities		Materials
5 min.	A.	Opening Remarks 1. State purposes of this session.	
		2. Define a goal and give reasons for analyzing it.	A2. Flip chart 1, Goal Analysis
		3. Give and then elicit examples of clearly stated goals. Use Mager's *Goal Analysis* as a reference.	A3. Resource Material, *Goal Analysis*
30 min.	B.	Questionnaire—Goal Statements 1. Refer participants to handout 1.	B1. Handout 1, Goal Statements
		2. Instruct trainees to: a. read each goal, b. indicate whether or not the goal is clearly stated, and c. discuss answers with neighbors when finished.	
20 min.	C.	Lecture—Principles of Goal Analysis Review the elements of a clear goal.	C. Flip chart 2, Elements of a Goal Statement
5 min.	D.	Closing Remarks 1. Summarize discussion of goals.	
		2. Link to next session.	
		3. Instruct trainees to bring copies of the goals of their organizations to the next session.	

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to understand how to formulate clear goals that can be interpreted in the same way by two or more people.
2. A goal is a statement of purpose or intent. Goal analysis has three important functions:

   a. It clarifies where one wants to go!

   b. It simplifies how one intends to get there!

   c. It states how one will know when one has arrived!

B. Questionnaire—Goal Statements

There are no discussion points for this section.

C. Lecture—Principles of Goal Analysis

A clear goal is one that can be interpreted in the same way by two people. To do this, a goal statement must:

a. state specifically the results to be accomplished,

b. state the result in measurable or observable terms, and

c. identify when the result will happen.

When a statement meets these criteria, it is possible to determine its achievement. The statement of learning goals makes possible the measure of instructional effectiveness. This is the reason for including the topic of goal analysis.

D. Closing Remarks

1. A clearly stated goal is a statement in measurable terms of an outcome to be achieved within a definite time period.
2. Training programs do not exist independently but are established to serve the purposes or goals of a larger organization. Defining organizational needs and goals will be the subject of the next session.

Session 5 Organization Needs Analysis

GOALS/OBJECTIVES:	The goal of this session is to make the participants understand the value of organizational needs analysis and its relationship to plans for training. By the end of the session participants will be able to name two ways in which their own job does or does not relate to the needs of their organization.
TIME REQUIRED:	1 hour
EQUIPMENT:	Flip chart paper, tripod or masking tape, markers, paper and pencils for all participants
MATERIALS: (Handouts and references are found in the Participant Workbook.)	Handout 1, Discussion Guide Reference 1, Organization Structure (for flip chart 1) Resource Material, Analyzing Performance Problems
PRIMARY METHODS:	Lecture, small group discussion, panel, and large group discussion
MEETING ARRANGEMENTS:	Drawing 6, Informal discussion setup Drawing 2, Workshop setup (See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 5.

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks	
	1. State purpose of this session.	
	2. State reason for this session.	
5 min.	B. Introductory Exercise	
	1. Ask trainees to take out pencil and paper.	B1. Paper and pencils
	2. Tell trainees to: a. draw an arc, b. draw a second arc linked to the first arc, and c. draw a third arc linked to the first and second arcs.	
	3. Show trainees the intended solution—a circle—on a flip chart.	B3. Flip chart paper, marker
	4. Summarize exercise (see opposite).	
10 min.	C. Organizational Goals	
	1. Referring to flip chart 1, review points relating to organizational goals analyzed as inputs and outcomes.	C1. Reference 1, Organization Structure (for flip chart 1)

Organization Needs Analysis

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to examine the relationship between the goals of an organization and the functions of the people in it. Organization needs analysis is the first stage of the Design Task needs assessment procedure.
2. The first step in designing a training event is to examine the goals and needs of the organization that the training event is intended to meet.

B. Introductory Exercise

4. It is possible to follow directions carefully and still not accomplish the goal if the goal is not clearly understood at the outset. Only by knowing the expected outcome of a job and how each task relates to that outcome can goals be achieved.

C. Organizational Goals

1. Organizational Resources

a. A systems approach to analyzing organization goals will divide an organization's resources and services into the following components:

$$\text{INPUTS} \longrightarrow \overbrace{\text{OUTPUTS} \longrightarrow \text{EFFECTS} \longrightarrow \text{IMPACT}}^{\text{OUTCOMES}}$$

Inputs are resources that are invested in a program or activity (staff, money, equipment, etc.). These are combined in various ways to produce outputs—the products or services of the program or activity (e.g., client contacts). These outputs are supposed to have effects on knowledge, attitudes, or behavior (e.g., increased knowledge about alcohol, decreased drinking). The effects of a program are intended to have some impact on the individuals, groups, or communities who are the beneficiaries of the program (decreased alcohol-related illness, decreased property damage).

b. An organization's outcomes are its goals. There should be an adequate relationship between high priority goals (outputs, effects, impacts) and the time and dollar resources (inputs) spent in achieving those outcomes. For example, if the highest impact priority for an agency is a decrease in juvenile use of alcohol, why spend 60 percent of a training budgey on training new intake counselors?

Time	Sequence of Activities	Materials
	C. (continued)	
	2. Ask trainees to brainstorm examples of inputs, outputs, effects, and impacts for a typical alcohol agency.	C2. Write on flip chart
	3. Review points listed opposite.	
20 min.	D. Small Group Discussion	
	1. Divide trainees into three small groups.	
	2. Refer them to handout 1, Discussion Guide.	D2. Handout 1, Discussion Guide
	3. Instruct trainees to: a. discuss the goals of their organizations (copies of which they were instructed to bring to this session) using the Discussion Guide to get started and b. appoint a chairperson to represent group in full session to follow.	
20 min.	E. Large Group Discussion	
	1. Reconvene all participants.	
	2. Request each chairperson to report on his or her group's discussion.	
	3. Have participants discuss each report.	

Points for Discussion

C. (continued)

2. Training is not always the top priority.

   a. Training is frequently considered the solution to a variety of administrative problems, since training is aimed at increasing the efficiency of expenditure of a major organizational resource: human energy.

   b. Training is not, however, always the solution. Other causes of the problem could be:

      (1) inadequate program or community resources,

      (2) environmental or political realities, or

      (3) unrealistic goals.

   It is necessary to examine organizational goals before planning training because:

   a. Training may not be the true problem solution.

   b. Other training needs may be uncovered in such an examination.

   c. The goals and priorities of the organization will affect;

      (1) the design of the training program,

      (2) the location and physical environment for the training, and

      (3) the opportunity to implement training.

   d. The trainee's readiness to learn will be affected by the value the organization places on training and the opportunity provided to exercise new skills.

D. Small Group Discussion

There are no discussion points for this section.

E. Large Group Discussion

There are no discussion points for this section.

Session 5

Time	Sequence of Activities	Materials
2 min.	F. Closing Remarks	
	1. Summarize importance of analyzing organizational goals when planning training.	
	2. Link to next session.	
	3. Refer to Mager & Pipe, *Analyzing Performance Problems*, as a useful source for further reading on performance analysis.	F3. Reference 2, *Analyzing Performance Problems, Or You Really Oughta Wanna*, Robert F. Mager and Peter Pipe. (Belmont, Calif.: Fearon Publishers, 1970).

Points for Discussion

F. Closing Remarks

1. Analysis of organizational goals can prevent unnecessary or inappropriate training and can improve needed training.
2. Trainers generally train people to do jobs that meet organizational goals. How to define those jobs in the context of the organization's goals will be the subject of the next session.
3. Three sessions of this course will be devoted to analyzing performance problems. Trainees should be encouraged to read the Mager book.

Session 6 — Job Analysis

GOALS/OBJECTIVES: The goal of this session is to familiarize the participants with the relationship of the job to the overall organization and to examine component job skill areas and job behaviors.

By the end of the session participants will be able to:

1. list areas of responsibility for their own jobs,
2. compile a list of sequential behaviors necessary to accomplish a task of one job area, and
3. assign minimal levels of acceptable performance for that task.

TIME REQUIRED: 1 hour

EQUIPMENT: Flip chart paper, tripod or masking tape, markers, paper, and pencils for each participant

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Sample Job Description, Skill Areas, and Job Behaviors

Flip chart 1, National Standard for Alcoholism Counselors (to be prepared from discussion points listed under section D)

Flip chart 2, Revised Standard (also to be prepared from section D)

PRIMARY METHODS: Lecture, individual task, large group discussion

MEETING ARRANGEMENTS: Drawing 3, Classroom setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 6

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks 1. State purpose of this session. 2. State sequence of activities.	
15 min.	B. The Job 1. Define "job." 2. Refer participants to handout 1, Sample Job Description, Skill Areas, and Job Behaviors. 3. Individual task: a. Ask trainees to use the job description section of handout 1 as an example and prepare their own job descriptions. b. Emphasize that trainees' desc tions should refer to their current responsibilities and not repeat an outdated description. c. Allow 5 minutes for task. 4. Discuss task with group, using uestions for discussion opposite, if necessary.	B2. Handout 1, Sample Job Description, Skill Areas, and Job Behaviors
20 min.	C. The Job Behaviors 1. Define "job behaviors." 2. Ask trainees to refer to the sample job behaviors on handout 1.	

Points for Discussion

A. Opening Remarks

1. Job analysis is the second stage of the needs assessment process that is an essential part of the training Design Task. The purpose of this session is to practice looking at the job in relation to:

   a. its place in the organization,

   b. the behaviors or performance skills necessary to carry out its functions in the organization, and

   c. the minimum level of competency required to get the job done.

2. Trainees will look first at job descriptions, then at component behaviors or skills, and finally at methods of establishing competency levels.

B. The Job

1. A "job" is defined as "the duties and areas of responsibility assigned to a job slot."

4. Questions for discussion:

   - What did you learn from this exercise?
   - How does the job description prepared relate to the organization's goals?
   - Is one area of the job more important than another; must one be given more time than another?
   - To whom does the person in the job described report? Is that person fully aware of the scope of the job being performed?
   - What output is expected from the job and in what time period?

C. The Job Behaviors

1. Each job description defines a number of duties. In order to carry out each duty a sequence of specific tasks is required. These tasks are known as the job "behaviors."

Time	Sequence of Activities	Materials
	C. (continued)	
	3. Explain the job behaviors (see opposite).	
	4. Individual task: a. Ask trainees to use the sample job behaviors of handout 1 as an example and prepare a list of job behaviors for one of the duties of their job descriptions. b. Emphasize that they should list the behaviors for a *single* duty. c. Allow 10 minutes for task.	
	5. Discuss task with group by sampling a few lists.	
20 min.	D. Defining Minimal Competency Levels	
	1. Define "competency level."	
	2. Read the proposed national counselor standard for counseling and treatment and discuss with group, using discussion points opposite.	D2. Flip chart 1, National Counselor Standard[1]
	3. Read revised standard for counseling and treatment.	
	4. Individual task: a. Ask trainees to write the minimum level of competency necessary for their jobs. b. In this case the trainee must be the judge of his or her own competency, as his or her superior is not present.	D4. Flip chart 2, Revised Standard

[1] *Proposed National Standard for Alcoholism Counselors*, final report submitted to NIAAA by Roy Littlejohn Associates, Inc., Aug. 1974.

Points for Discussion

C. (continued)

3. The job behaviors are the tasks required by a single skill area of the overall job. In this case the single skill area being defined by the job behaviors is that of curriculum design.

D. Defining Minimal Competency Levels

1. A competency level answers the question: "How well must the individual be able to perform the task in order to fulfill the job function and contribute to achieving the organizational goals?"
2. A proposed national counseling and treatment standard[1] for alcoholism counselors for counseling and treatment is "the ability to establish a genuine therapeutic relationship with the client."

   Discussion points:

   - What evidence would show that a genuine therapeutic relationship was established?
   - To whom need the evidence be shown? To the counselor? The agency director? The National Certification Board? The client himself?
   - It is important that the parties to whom performance is accountable agree in advance on an acceptable level of competency.
3. A possible revised standard could be: "Demonstrates ability to establish a genuine therapeutic relationship with clients by retaining 20 percent of first interview clients for at least two additional interviews over an 8-week period."

Session 6

Time	Sequence of Activities	Materials
	D. (continued)	
	5. Discuss task with group, using discussion points opposite.	
2 min.	E. Closing Remarks	
	1. Summarize session.	
	2. Link to next session.	

Points for Discussion

D. (continued)

5. Discussion points:

- How do minimum competency levels affect training needs?
- What would happen to a training program if minimum competency levels were not established in advance?

E. Closing Remarks

1. In this session the trainees have taken an intensive look at the job, the job behaviors, the level of competency necessary for the job, and how these concepts relate to training needs.
2. In the next content session the trainees will learn how to assess the individual's performance on the job.

Session 7 Organizing Design Resource Groups

GOALS/OBJECTIVES: Participants will assess their strengths and weaknesses in the six skill areas of the design task, using a standard form.

By the end of this session, participants will have completed and analyzed a Self-Assessment Guide covering the following skills:

1. Organization Needs Assessment
2. Job and Performance Analysis
3. Training Group Analysis
4. Writing Learning Outcomes
5. Curriculum Building
6. Evaluation and Feedback

TIME REQUIRED: 1 hour (includes ½-hour work session)

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)
Handout 1, Self-Assessment Guide
Reference 1, Self-Assessment Task Instructions (for flip chart 1)
Reference 2, Formation of Resource Groups (for flip chart 2)

PRIMARY METHODS: Lecture, small group discussion

MEETING ARRANGEMENTS: Drawing 6, Informal discussion setup
Drawing 2, Workshop setup
(See "Illustrations of Various Meeting Arrangements" in section IV of this manual)

Session 7

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks State purpose of this session.	
20 min.	B. Small Group Task—Self-Assessment	
	1. Distribute handout 1, Self-Assessment Guide	B1. Handout 1, Self-Assessment Guide
	2. Discuss guide (see opposite)	
	3. Divide trainees into groups of three.	
	4. Using flip chart 1 with task written out, instruct trainees to: a. assess their strengths and weaknesses in each of the six areas and b. share with their colleagues their self-ratings and the reasons for them.	B4. Reference 1, Self-Assessment Task Instructions (for flip chart 1)
5 min.	C. Design Task Resource Groups	
	1. Reconvene participants.	
	2. Explain need for resource groups.	
	3. Using flip chart 2, instruct trainees that in the work period following they are to: a. talk with each other and form groups of three or four persons and b. choose resource groups by the beginning of the next session.	C3. Reference 2, Formation of Resource Groups (for flip chart 2)
	4. Point out to the trainees that it will be to their advantage to have a balance of strengths in as many of the design areas as possible.	
2 min.	D. Closing Remarks	
	1. Link to next session.	
	2. Restate time when resource groups must be formed.	
	3. Request trainees to bring their TEPG packages to next content session.	
	4. Provide 30 minutes for a work session.	

Points for Discussion

A. Opening Remarks

The purpose of this session is to set up trainee resource groups that can assist their members in the completion of their design tasks.

B. Small Group Task—Self-Assessment

2. The Self-Assessment Guide is designed as an aid in analyzing personal strengths and weaknesses in the planning skills outlined in the TEPG.

C. Design Task Resource Groups

2. The resource groups are formed to provide trainees with help from other trainees with complementary skills. No trainee will be strong in all areas of planning, but it should be possible to assemble a group that has several of the skills represented among its members.
3. A design task work period follows this session, during which participants will have a chance to form resource groups.

D. Closing Remarks

1. The next session is a work period.
2. Resource groups must be formed by the beginning of the next content session.

Session 8 Performance Analysis I—Introduction

GOALS/OBJECTIVES: Participants will know the purpose of performance analysis within a training context.

By the end of the session participants will be able to describe the basic process of performance analysis.

TIME REQUIRED: ½ hour

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Reference 1, Steps in Performance Analysis (for flip chart 1)
Reference 2, Training Event Planning Guide (see session 3)
Handout 1, Flow chart
Handout 2, Quick Reference Checklist
Reference 3, Problem Factors (for flip chart 2)

PRIMARY METHODS: Lecture, group discussion, question and answer

MEETING ARRANGEMENTS: Drawing 6, Informal Discussion setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 8

Time	Sequence of Activities	Materials
5 min.	A. Opening Remarks 1. State purpose of this session. 2. Relate session to overall needs assessment process. a. Organization Need Analysis b. Job Analysis c. Performance Analysis	
10 min.	B. Performance Analysis Steps 1. Review steps in performance analysis and give an example of each. 2. Ask trainees to take out their copies of the TEPG and point out that pages 13-16 cover performance analysis.	B1. Reference 1, Steps in Performance Analysis (for flip chart 1) B2. Reference 2, Training Event Planning Guide
10 min.	C. Application of Mager's *Analyzing Performance Problems.*[1] 1. Refer participants to handout 1. 2. Relate performance analysis steps to questions in handout 1. 3. Using reference 3, review possible causes of organizational problems on flip chart 2.	C1. Handout 1, Flow Chart C3. Reference 3, Problem Factors (for flip chart 2)

Performance Analysis I—Introduction

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to introduce the trainees to the concept of performance analysis—the process of examining behavior in terms of standards of performance.
2. This session outlines the third stage of the needs assessment procedure:

   a. The trainees have now had experience in identifying the goals of the organization and relating training needs to these goals.

   b. They have also practiced writing specific job descriptions and determining minimum levels of competency for those jobs.

   c. The next step is to develop a means of analyzing the performance of the people in the jobs to determine whether training is necessary in order to meet performance standards and thus accomplish goals.

B. Performance Analysis Steps

1. See reference 1 for four steps in performance analysis.

2. The steps in performance analysis are spelled out in the TEPG as follows:

   a. Step 1 (identify workers whose performance will be analyzed) and step 2 (identify behavior and knowledge that will be analyzed) are covered on page 13.

   b. Step 3 (design method to collect necessary data) is covered on pages 14-15.

   c. Step 4 (analyze data and identify nature of problem) is covered on page 16.

C. Application of Mager Book on Performance Analysis

2. The steps just examined are covered in the book by Mager and Pipe, *Analyzing Performance Problems.*

   a. The flow chart reproduced on handout 1 summarizes the analysis process (see Participant Workbook, p. 44).

   b. The checklist in Participant Workbook, pages 45-47, handout 2 provides a guide to carrying out the process.

3. Training is not always the answer to an organizational problem. Mager and Pipe point out that a performance problem may be the result of:

   a. a knowledge/skill gap,

   b. an external force, or

   c. an internal force.

Time	Sequence of Activities	Materials
	C. (continued)	
	4. Ask trainees to suggest possible solutions to these problems; elicit responses listed opposite.	
	5. Refer participants to Handout 2.	C5. Handout 2, Quick-Reference Checklist
	a. Walk through and explain Mager's Quick-Reference Checklist.	
	b. Answer questions after each issue.	
	c. Recommend reading *Analyzing Performance Problems.*	
5 min.	D. Closing Remarks	
	1. Review content of this introductory session.	
	2. Link to next sessions on data collection.	

[1] Mager, R.F., and Pipe, P. *Analyzing Performance Problems.* Belmont, Calif.: Fearon Publishers, Inc. 1972.

Points for Discussion

C. (continued)

4. Points to elicit:

- An external force can be addressed by administrative action.
- An internal force could be a personal problem and require a counseling solution.
- A knowledge/skill gap may be addressed by training, either:
  a. with a program within the agency,
  b. with an external program,
  c. with an inservice group training program, or
  d. with one-to-one training.

D. Closing Remarks

1. In this session the purpose and method of performance analysis have been examined.
2. In the next two sessions methods of collecting data for the analysis will be studied.

Session 9 Performance Analysis II—Questionnaire

GOALS/OBJECTIVES: Participants will know the four areas to be considered when constructing questions for a questionnaire or standardized interview when a performance analysis is being done.

By the end of the session participants will have analyzed a sample questionnaire and evaluated it by examining these four factors:

1. form of response,
2. place of question in overall sequence,
3. the wording of the question, and
4. the content of the question.

TIME REQUIRED: 1 hour

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Guide to the Construction of Questionnaires

Handout 2, Survey of Work Plans of Young People

Handout 3, Teacher Interview Questionnaire

Handout 4, NGAE Questionnaire

Reference 1, Steps in Questionnaire Construction (for flip chart 1) (under B1 Points for Discussion)

Reference 2, Factors in Questionnaire Construction (for flip chart 2) (under B2 Points for Discussion)

PRIMARY METHODS: Lecture, small group activity, large group discussion

MEETING ARRANGEMENTS: Drawing 6, Informal discussion setup

Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 9

Time	Sequence of Activities	Materials
5 min.	A. Opening Remarks State purpose of session.	
15 min.	B. Questionnaire Construction	
	1. Review steps of questionnaire construction, using reference 1 to draw up flip chart 1.	B1. Reference 1, Steps in in Questionnaire Construction (for flip chart 1)
	2. Present factors to be considered in writing questions, using reference 2 to draw up flip chart 2.	B2. Reference 2, Factors in Questionnaire Construction (for flip chart 2)
	3. Refer participants to handouts 1 and 2.	B3. Handout 1, Guide to the Construction of Questionnaires Handout 2, Survey of Work Plans of Young People
	4. Review the factors presented in handout 1 to be considered in writing questions, using handout 2 as illustration of the right way.	
	5. Refer participants to handout 3.	B5. Handout 3, Teacher Interview Questionnaire

Performance Analysis II—Questionnaire

Points for Discussion

A. **Opening Remarks**

In order to analyze performance, as discussed in the previous session, it is necessary to collect data on performance. The purpose of this session is to examine one of the most frequently used methods of data collection, the questionnaire.

B. **Questionnaire Construction**

1. The steps in constructing a questionnaire are to:

   a. determine what information the questionnaire should be designed to elicit;

   b. identify who will be filling out the questionnaire;

   c. develop a first draft, taking a and b into consideration;

   d. revise the first draft;

   e. pretest the questionnaire and then edit it on the basis of that pretest (The pretest provides an opportunity for discovering the practical errors the questionnaire may have. This step should never be left out.); and

   f. review the procedures as stated to eliminate any ambiguities in the instructions or wording of questions.

2. Four factors should be considered when writing questions:

   a. the form of the response,

   b. the place of the question in the overall sequence,

   c. the wording of the question, and

   d. its content.

Time	Sequence of Activities	Materials
	B. (continued)	
	6. Point out errors made in construction of handout 3 (see opposite). Discuss how to improve question 6.	
20 min.	C. Small Group Activity—Questionnaire Evaluation	
	1. Refer participants to handout 4, NCAE Questionnaire.	C1. Handout 4, NCAE Questionnaire
	2. Instruct trainees to divide into resource groups.	
	3. Assign each resource group a single principle of writing a good questionnaire (form, sequence, wording, or content).	
	4. Ask each resource group to identify good and bad examples in handout 4 of the construction principle assigned.	
15 min.	D. Large Group Discussion—Questionnaire Evaluation	
	1. Reconvene participants.	
	2. Ask a member of each resource group to present its examples.	
	3. Discuss each example with full group.	
5 min.	E. Closing Remarks	
	1. Summarize session.	
	2. Link to next session.	

Points for Discussion

B. (continued)

6. Errors of construction in Teacher Interview Questionnaire:

   a. Paragraph 2 of Introduction—ambiguous wording
   b. Question 2—unclear
   c. Question 2B—too broad
   d. Question 7—too open-ended
   e. All of the errors could have been discovered with a pretest and eliminated before the questionnaire was used.

   Question 6 could be improved by protecting the respondent's ego, asking, "Do you happen to know?" rather than, "Do you know?" or by qualifying the question first: "Some people feel this way, some that. How do you feel?" Ask for positive comments first or pose the question as a hypothetical situation to make the respondent comfortable.

C. Small Group Activity—Questionnaire Evaluation

There are no discussion points for this section.

D. Large Group Discussion—Questionnaire Evaluation

There are no discussion points for this section.

E. Closing Remarks

1. The quality of data collected is only as good as the quality of the instrument used in collecting.
2. In the next session a more direct method of collecting data—the interview—will be examined.

Session 10 Performance Analysis III—Interviewing

GOALS/OBJECTIVES: The goal of this session is to familiarize the participants with the process of planning an interview.

Participants will demonstrate this familiarity by developing a plan for a role-play interview which takes into account factors specified in handout 3 of this session:

1. interview objective(s),
2. topics which need to be covered,
3. wording and sequencing of questions,
4. interview introduction,
5. setting and atmosphere, and
6. interview style.

TIME REQUIRED: 1¾ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers, watch or clock with second hand

MATERIALS: (Handouts and references are found in the Participant Workbook, except handouts 2, 8, and 9 in Section IV of this manual)

Handout 1, The Secretary's Hold Button
Handout 2, Secretary's Role
Handout 3, The Interview
Handout 4, Interview Checklist
Handout 5, The Antabuse Problem
Handout 6, The Recordkeeping Problem
Handout 7, Interview Planning Guide
Handout 8, Senior Counselor's Role
Handout 9, The Recordkeeping Problem: The Director's Role

PRIMARY METHODS: Lecture, role playing, large group discussion

MEETING ARRANGEMENTS: Drawing 6, Informal discussion setup and two separate planning-areas
(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 10

Time	Sequence of Activities	Materials
	A. Preliminary	
	Privately request volunteers for the first role play, explaining that they will act out brief "parts" before the group.	
3 min.	B. Opening Remarks	
	State purpose of the session.	
	C. Role Play I	
5 min.	1a. Refer group to handout 1.	C1a. Handout 1, The Secretary's Hold Button
	b. Refer the volunteer for the secretary's role to handout 2.	C1b. Handout 2, Secretary's Role (Prepare one copy before beginning of session)
	2. Set up role play:	
	a. Describe role play.	
	b. Ask role players to sit in middle of group.	
	c. Give trainees a few minutes to read the problem statement.	
	d. Announce 3-minute limit on role play.	
5 min.	3. Role play takes place.	
	4. Read handout 2 to entire group.	
15 min.	5. Analyze role play with group (see opposite).	
10 min.	D. Lecture—The Interview	
	1. Distribute handout 3, The Interview.	D1. Handout 3, The Interview
	2. Explain that trainees need not take notes as the handout contains all the material.	

Performance Analysis III—Interviewing

Points for Discussion

A. Preliminary

There are no discussion points for this section.

B. Opening Remarks

The purpose of this session is to introduce trainees to some of the dynamics of interviewing and to give them some practice by means of participating in role playing.

C. Role Play I

2a. In the following exercise, two trainees will enact (role play) an interview held to determine the cause of a performance problem. One trainee will play the interviewer, who is trying to discover the reason for a staff problem, and the other trainee will play the part of the secretary, who is reacting to a fear he or she does not realize he or she has.

5. Begin the analysis by asking the role players to tell the group how they felt during the role play. This is very important, as it gives the players a chance to release any hostility that may have arisen in the course of the role play. Then, ask the group what they saw happening and what they think were the reasons for the words and actions of the two role players.

Use the role play to point up the need for a trainer to prepare for an interview and the importance of attitude and language, i.e., interviewing "style."

D. Lecture—The Interview

Time	Sequence of Activities	Materials
	D. (continued)	
	3. Deliver lecture, covering points on opposite page.	
	4. Refer participants to handout 4 and explain.	D4. Handout 4, Interview Checklist
50 min.	E. Role Plays II and III	
	1. Divide trainees into two groups.	
	2. Refer group A to handout 5.	E2. Handout 5, Antabuse Problem
	3. Refer Group B to handout 6.	E3. Handout 6, The Recordkeeping Problem Statement
	4. Refer all to handout 7.	E4. Handout 7, Interview Planning Guide
	5. Instruct each group to: a. pick one group member to play role of interviewer, b. use handout 7 to plan a 6-minute interview that will uncover the source of the performance problem.	
	6. Explain that when planning is completed, each group will select an individual from the opposite group to play the part of the interviewer for the interview they have planned.	
	7. Allow planning time.	

Points for Discussion

D. (continued)

3. Points for the interview:

   a. Types of Interviews
      - standardized interview
      - nonstandardized interview

   b. Interview Process
      (1) Determine your objective.
      (2) Select the areas you need to cover to achieve your objective.
      (3) Arrange these areas in a logical sequence.
      (4) Plan your introduction.

   c. Interview Atmosphere
      - Seating arrangement
      - Personal style

4. Handout 4 is a checklist that covers the points made in the preceding lecture. This checklist is provided for the trainees use both in their own back-home training situation and in the role-play interviews that follow.

E. Role Plays II and III

There are no discussion points for this section.

Time	Sequence of Activities	Materials
	E. (continued)	
	8. Set up role play:	
	a. Reconvene full session.	
	b. Explain the two options for conducting the role play:	
	(1) Noncoached—interview will conduct whole role play without assistance from group.	
	(2) Coached—trainer will interrupt role play at periodic intervals so that group can coach interviewer.	
	c. Announce time restrictions:	
	(1) Six minutes for each role play.	
	(2) Coaching breaks every 2 minutes.	
	9. Role Play II	
	a. Ask group A to select interviewer from group B.	
	b. Give interviewer a copy of handout 8.	E9b. Handout 8, Senior Counselor's Role (Prepare one copy before beginning of session)
	c. While interviewer reads role, check whether group A wants to coach interviewer.	
	d. Read handout 4, Antabuse, to full group.	
	e. Commence role play, breaking for coaching if desired.	
	10. Role play III works the same as role play II, with groups reversed and new problem, handout 9.	E10. Handout 9, The Director's Role (Prepare one copy before beginning of session)
20 min.	F. Role-Play Analysis	
	1. Lead general discussion of both role plays, again asking how each player felt and emphasizing points made in lecture.	
	2. Specific analysis of problems:	
	a. Ask interviewer A to state what he or she believed was the problem.	
	b. Ask interviewee to read his or her role.	
	c. Repeat for group B.	
	d. Discuss.	

Points for Discussion

E. (continued)

F. Role-Play Analysis

There are no discussion points for this section.

Time	Sequence of Activities	Materials
	F. (continued)	
	3. Ask each group to state what objectives had been set forth in its Interview Planning Guide.	
2 min.	G. Closing Remarks	
	1. Summarize performance analysis sessions.	
	2. Link to next session.	

Points for Discussion

F. (continued)

G. Closing Remarks

1. In the past three sessions the subject of performance analysis has been explored, first in a general way and next by looking at two ways of gathering data to determine training needs.
2. In the next session participants will learn how to look at training needs for an entire group.

Session 11 — Training Group Analysis

GOALS/OBJECTIVES: The goal of this session is to familiarize participants with the different bases for selecting training groups.

Participants will demonstrate their understanding of this by applying specified selection criteria for building sample training groups:

1. common need of learners,
2. common interest of learners,
3. mixed or shared characteristics, and
4. time and resource constraints.

TIME REQUIRED: 1½ hours (include 30-minute work session)

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Job Descriptions

Reference 1, Selection Criteria (for flip chart 1)

Reference 2, Examples of Common Need

PRIMARY METHODS: Lecture, small group activity, large group discussion

MEETING ARRANGEMENTS: Drawing 6, Informal Discussion setup

Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 11

Time	Sequence of Activities	Materials
2 min.	A. Opening Remarks State purpose of this session.	
10 min.	B. Lecture and Discussion—Training Group Composition	
	1. Using reference 1, make flip chart 1 to review selection criteria (see opposite).	B1. Reference 1, Selection Criteria (for flip chart 1)
	a. Explain common need basis and illustrate with reference 2.	B1a. Reference 2, Examples of Common Need
	b. Elicit teaching points opposite.	
	c. Learner attitude.	
	d. Time and resource constraints.	
30 min.	C. Small Group Task—Training Group Composition	
	1. Refer Trainees to handout 1, Job Descriptions	C1. Handout 1, Job Descriptions
	2. Describe task (see opposite).	
	3. Instruct participants to: a. Use pages 20 through 26 of the TEPG as a guide in the task. b. Read handout 1. c. Select a description and join others working on that description. (Make sure all three jobs are worked on.) d. Select a group reporter to report to the whole group later.	

Points for Discussion

A. Opening Remarks

The purpose of this session is to provide trainees with criteria for determining the composition of training groups.

B. Lecture and Discussion—Training Group Composition

1. Selection of training groups can be determined in a number of different ways:

a. Groups may be assembled on the basis of *common need*—all participants might have need for a certain skill in training or might need help in becoming more open in a counseling situation. Common need is the most usual basis for selecting a training group.

b. The group may be selected on the basis of shared or mixed characteristics, such as age group, economic background, or educational level. Mixing group characteristics has both advantages and disadvantages.

Teaching points:

- Mixed age group: the exposure to breadth of experience versus possible role conflict.
- Mixed sociocultural group: the opportunity for improving mutual understanding versus difficulty in communication.
- Mixed training/educational experience: the opportunity for peer teaching versus the possible adverse effect of oversimplified material upon sophisticated participants.

c. The learners must all be ready and willing to learn.

d. All learners should have the same amount of time available and similar resources.

C. Small Group Task—Training Group Composition

2. The task is to identify specific criteria appropriate for building a trainee group for one of the jobs described. It is assumed for the purpose of this task that there is a good-sized pool of candidates available for the training. The object is to use selection criteria presented earlier as a basis for choosing the best possible trainee group with which to initiate a training program.

Session 11

Time	Sequence of Activities	Materials
15 min.	D. Large Group Discussion—Report on Tasks 1. Reconvene participants. 2. Ask each group reporter to present the selection criteria identified by his or her group for choosing training group members. 3. Encourage reaction and discussion following each presentation.	
2 min.	E. Closing Remarks 1. Review selection criteria, emphasizing common need. 2. Link to next session. 3. Provide 30 minutes for a work session.	

Points for Discussion

D. Large Group Discussion—Report on Tasks

There are no discussion points for this section.

E. Closing Remarks

1. Four criteria for selecting training groups have been examined in this session:

   a. common need, the most important criterion;

   b. shared or mixed characteristics;

   c. learner attitude; and

   d. time and resource constraints.

2. Whenever possible trainees should adapt the criteria to select or analyze their training groups. In the work session that follows trainees will apply the criteria to selecting a group for their design task.

Session 12 Instructional Objectives

GOALS/OBJECTIVES: Participants will refine and improve existing knowledge and skills necessary to distinguish between correctly stated and incorrectly stated instructional objectives.

At the end of the session participants will be able to discriminate among objectives which do/do not meet these requirements:

1. State terminal behavior.
2. Include performance conditions.
3. Give criteria for acceptable performance.

TIME REQUIRED: 1 hour

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handout is found in the Participant Workbook.) Handout 1, Self-Test (Source: R. F. Mager (Belmont, Calif.: Fearon Publishers) *Preparing Instructional Objectives.*)

PRIMARY METHODS: Lecture, individual task, large group discussion

MEETING ARRANGEMENTS: Drawing 3, Classroom setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

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Session 12

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks State purpose of this session.	
30 min.	B. Lecture—Instructional Objectives 1. Introduction a. Definition of instructional objective. 2. Example—Civil War history project. 3. Relationship between goal and instructional objective. 4. Components of a properly stated objective include a statement of: a. terminal behavior,	

Points for Discussion

A. Opening Remarks

The purpose of this session is to give trainees intensive practice in recognizing and evaluating instructional objectives.

B. Lecture—Instructional Objectives

1. Introduction

a. An instructional objective is a specific learning outcome that the trainer wishes the trainee to achieve. Like the goal studied earlier, the instructional objective must identify what the acceptable behavior is, how it can be measured, and when it will be accomplished satisfactorily.

2. Example—Civil War history project

a. A teacher was asked to perform a task with what seemed like a clear objective—to teach immigrants enough Civil War history to allow them to pass the naturalization test.

b. The teacher decided that when the immigrants could pass a quiz on the subject, the goal would be achieved. The quiz included information known to be included on the naturalization test. Three of the quiz items were:

(1) Select the names of five Civil War generals from a list of proper names.

(2) Name two social, political, or economic causes of the Civil War.

(3) Name and locate on a map four famous battles.

c. However, having established this means of assessing the students' knowledge, the teacher had not specified the criteria for a correctly written instructional objective:

(1) How many correct answers were the students required to give for each item? Did they have to know all the answers?

(2) Under what conditions were the answers to be given? Were the students allowed to bring a textbook to the quiz?

(3) What amount of time were the students allowed to answer the questions? Several hours? Several weeks?

3. A goal is a more inclusive statement than an instructional objective. One or more objectives may be derived from a broad goal. Both goals and objectives may contain the same components. Often goal statements do not include all three components.

4. A correctly stated objective does the following:

a. *Identifies terminal behavior.* A statement of an objective is useful only to the extent that it specifies what the learner must be able to do or perform when he or she is demonstrating his or her mastery of the objective. This specific behavior must be observable. The most important characteristic of a useful objective is that it identifies the kind of performance that will be accepted as evidence that the learner has achieved the objective.

Time	Sequence of Activities	Materials
	B4. (continued)	
	b. performance conditions, and	
	c. criteria for acceptable performance.	
25 min.	C. Self-Test—Analyzing Instructional Objectives	
	1. Distribute handout 1 containing Self-Test.	C1. Handout 1, Preparing Instructional Objectives, Self-Test
	2. Instruct trainees to: a. answer test questions and b. discuss answers with neighbors when completed.	
	3. Discuss test questions and results with group. Emphasize the three components of a good instructional objective.	
2 min.	D. Closing Remarks	
	1. Summarize discussion of instructional objectives.	
	2. Link to next session.	

Points for Discussion

B4. (continued)

b. *States performance conditions.* Terminal behavior must be defined further by stating the conditions imposed upon the learner when he or she is demonstrating mastery of the objective. Examples of such conditions are:

(1) given a list of counseling terms, or

(2) without the use of a dictionary, or

(3) with a standard set of tools, or

(4) carrying a 40-pound pack.

c. *States criteria for acceptable performance.* It is necessary to specify at least the minimum acceptable performance for each objective in order to have a performance standard against which to measure the achievement of the objective. When teaching results cannot be evaluated, the teacher is in the awkward position of being unable to demonstrate that he or she is teaching anything at all.

C. Self-Test—Analyzing Instructional Objectives

There are no discussion points for this section.

D. Closing Remarks

1. Once the goal is defined and the objective specified, the job of training is well on its way to completion.

2. The next step is to select those learning activities that will satisfy the objectives and achieve the goal. The kinds of activities appropriate for achieving instructional objectives for adult learners will be examined in the next session.

Session 13 — Adult Learning Theory

GOALS/OBJECTIVES: The goals of this session are to:

1. expand the participants' knowledge of the theory of adult learning and
2. facilitate the participants' self-assessments of their own tendencies to foster or frustrate adult learning.

By the end of the session participants will be able to:

1. name the four characteristics of adult learning and
2. cite examples of learning activities that comply with the four characteristics.

TIME REQUIRED: 1½ hours

EQUIPMENT: Flip chart paper, tripod, masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)
Handout 1, Self-Diagnostic Work Sheet
Reference 1, Discussion Questions (for flip chart 1)

PRIMARY METHODS: Lecture, brainstorming, individual exercise, small group discussion, panel discussion

MEETING ARRANGEMENTS:
Drawing 6, Informal discussion setup
Drawing 2, Workshop setup
(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 13

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks 1. State purpose of this session.	
10 min.	B. Brainstorming Exercise—Characteristics of Adult Learning 1. Request trainees to give as many characteristics as they can think of, using the questions listed opposite as starters. 2. Record all contributions on blank flip charts.	B2. Blank flip charts
10 min.	C. Lecture—The Four Characteristics of Adult Learners 1. Make lecture points opposite.	
25 min.	D. Individual Exercise—Self-Diagnosis 1. Refer participants to handout 1, Self-Diagnostic Work Sheet. 2. Instruct trainees to: a. fill out work sheet and b. turn to a person next to them and discuss what they do that accommodates these four characteristics. 3. Ask trainees to comment on most effective and least effective techniques they heard discussed.	D1. Handout 1, Self-Diagnostic Work Sheet

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to introduce the trainees to the basic theories of adult education.
2. Adult education theories are based on research findings and to a degree on certain assumptions about the nature of man and the process of human development. A basic principle is that differences between adults are great and must be taken into account in training.

B. Brainstorming Exercise—Characteristics of Adult Learning

1. Starter questions for brainstorming:
   - Do all adults learn the same way? What are the differences?
   - Do children and adults learn the same way? What are the differences?
   - What are some of the ways adults become frustrated in learning?

C. Lecture—The Four Characteristics of Adult Learners

1. Adult learning differs from nonadult learning in the following ways:
   a. Difference in self-concept:
      (1) A child is a dependent person at birth, but as he or she matures he or she becomes more autonomous;
      (2) Each adult is at a different stage of autonomy;
      (3) Adults identify themselves by their differences from others.
   b. Difference in accumulated experience: Adults have a broader base of experience upon which to draw and to share with others.
   c. Difference in readiness to learn: Adults seek to learn what they have identified as important rather than what others deem important.
   d. Difference in time perspective:
      (1) Adult learning stresses immediacy of application and
      (2) Adult orientation to learning is problem-centered, not subject-centered.

D. Individual Exercise—Self-Diagnosis

There are no discussion points for this section.

7

Time	Sequence of Activities	Materials
10 min.	E. Lecture—Adult Learning Activities 1. Make lecture points opposite.	
20 min.	F. Small Group Activity—Adult Learning Discussion 1. Divide trainees into three groups. 2. Instruct trainees to discuss topics listed opposite. 3. Instruct groups to select a representative to be a panel member in the discussion following.	F2. Reference 1, Discussion Questions (for flip chart 1)
10 min.	G. Panel Discussion 1. Reconvene participants. 2. Direct panel members to sit at the front of the group. 3. Lead discussion centered around question: What areas did your group discuss?	
2 min.	H. Closing Remarks 1. Summarize events of the session. a. Four principles of adult learning. b. Small group discussion of methods of using the four principles. 2. Link to next session.	

Points for Discussion

E. Lecture—Adult Learning Activities

1. Adult learning activities must be:

   a. Self-directed. Design the activity so the learner can be involved directly in conducting the learning experience.

   b. Problem-centered. Make the activity applicable to the learner's needs, as determined by a needs assessment. Have activities bear on interests and problems of the learner.

   c. Experienced-based. Design activities around the group's individual or shared experiences and backgrounds.

   d. Immediate in application. The learner should be able to put what he or she learns to use directly.

F. Small Group Activity—Adult Learning Discussion

2. Discussion questions:

- Cite examples of learning activities that make use of one or more of the four principles of adult learning.
- What problems might these activities present to the traditional teacher?

G. Panel Discussion

There are no discussion points for this section.

H. Closing Remarks

1. In this session trainees have:

   a. examined the four principles of adult education and

   b. had the opportunity to discuss how to apply these principles.

2. In the next session the subject of how to apply principles of adult learning, or methodology, will be entered into in greater detail.

Session 14 — Methodology I

GOALS/OBJECTIVES: The goals of this session are to:

1. introduce the participants to the broad field of methodology and
2. provide them with the bibliography and other tools to undertake a study of the subject on their own.

At the end of the session participants will be able to:

1. describe the differences between the major categories of training methods,
2. name the three kinds of learning outcomes, and
3. write learning objectives for each kind of learning outcome.

TIME REQUIRED: 2 hours

EQUIPMENT: Participant Workbooks, flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, 100 3 x 5 cards
Handout 2, Methods Categories
Handout 3, Sample Action Words
Handout 4, Types of Learning Task Sheet
Handout 5, Appropriate Methods
Handout 6, Training of Trainers—Selected Bibliography
Flip Chart 1, Methodology Sequence (to be prepared from section B1b)
Flip Chart 2, Cone of Experience (to be prepared from Reference 1)
Flip Chart 3, Sample Objectives (optional; create own examples)

PRIMARY METHODS: Lecture, audience reaction panel, question and answer, individual task work

MEETING ARRANGEMENTS: Drawing 3, Classroom setup
(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 14

Time	Sequence of Activities	Materials
5 min.	A. Preliminary	
	1. Select two-person audience reaction panel to sit in front row during lecture.	
	2. Briefly describe concept of audience reaction panel to the trainees selected.	
	3. Instruct the panel not to ask questions on certain subjects—for example, no questions on simulation techniques, or any other sensitive areas which the trainer does not wish to deal with at this time.	
10 min.	B. Opening Remarks	
	1. Introduce day of methodology sessions.	
	a. State purpose of day.	
	b. State sequence of activities (see opposite).	B1b. Flip Chart 1, Methodology Sequence
	2. State purpose of session.	
	C. Lecture—Methods Overview	
5 min.	1. Set up audience reaction panel procedure.	
	a. Explain use of lecture format.	
	b. Distribute 3 x 5 cards.	C1b. Handout 1, Blank 3 x 5 cards
	c. Instruct trainees to ask no questions during the lecture but to write them down on the 3 x 5 cards.	

Points for Discussion

A. Preliminary

2. An audience reaction panel is a technique designed to accomplish some degree of participation with a large audience or with a smaller group listening to a lecture that covers a great amount of detail. It has an added feature of protecting the speaker from having to handle questions about sensitive or unfamiliar material. (See C1 below for more detail.)

B. Opening Remarks

1. The entire day of training will be devoted to the subject of methodology.
   a. The purpose of the day is to expand the trainees' repertoires of training techniques. This will be accomplished:
      (1) by surveying the wide scope of methods and techniques,
      (2) by examining the principles for choosing various methods, and
      (3) by explaining the principles of design used in sample exercises.
   b. Four topics will be covered during the day (sequence):
      (1) Methods Overview—What is a method? What is a technique? How are methods categorized?
      (2) Methods Selection Principles—How does a trainer decide which method to choose? Why select one technique over another?
      (3) Concentration on Selected Techniques—Lecture, demonstration, role play, creative thinking, audience reaction panel, listening team.
      (4) Design of a Learning Activity—What are the components of a model exercise? How should a learning activity using several techniques be designed?
2. The purpose of the first session is to present a survey of methods and techniques and study several principles of selection of those methods.

C. Lecture—Methods Overview

1a. This session has a high amount of content information; therefore, a high-content delivery form—the formal lecture—has been chosen.

Time	Sequence of Activities	Materials
	C1. (continued)	
	d. Describe procedure to be used at end of lecture: (1) Audience will pass cards to panel. (2) Panel will sort cards, put questions in a priority order, and ask questions of lecturer. (3) Lecturer will answer only questions from the panel.	
20 min.	2. Lecture a. Distinguish between method and technique.	
	b. Describe types of method taxonomies.	
	c. Distribute handout 2, Methods Categories.	C2c. Handout 2, Methods Categories
	d. Describe category system used in handout 2.	
10 min.	Break	
10 min.	3. Audience reaction panel a. Answer questions posed by panel. b. Ask panel to repeat specific instructions given privately at beginning of session.	

Points for Discussion

C1. (continued)

2. Lecture points:

   a. Distinction between method and technique:

      (1) Method—A general type of learning exercise organization, such as large group methods, small group methods, correspondence school methods, primary school methods, etc. A method is the way people are organized for learning.

      (2) Technique—A specific type of learning activity within a general method group. In handout 2 the method is "presentation," the technique is "lecture." The focus is on the utility of a technique to achieve the stated objectives. A technique helps a learner to learn.

   b. Training techniques may be categorized in a variety of ways: by audience size, frequency of assembly, I.Q. of audience, trainer role, audience role, expected learning outcome, etc.

   c. In handout 2 techniques are categorized by the degree to which the learner has input into the learning situation:

      (1) Presentation: aims at delivery of information. In presentation techniques the learner is a listener, with little feedback.

      (2) Participation: aims at engaging the learner. In participation techniques the learner has means to demonstrate his or her reception of the material to the trainer.

      (3) Simulation: aims at experiential learning. In simulation techniques the learner directly experiences the learning.

      (4) Human Relations: aims at interpersonal learnings. In human relations techniques the learner can achieve affective goals.

Time	Sequence of Activities	Materials
	C3. (continued)	
	c. Point out benefit of lecturer control in this technique (see opposite).	
	D. Methods Selection Principles	
5 min.	1. Sample trainee experience by asking what methods they use (5 minutes only). Lead question: How do you decide which method to use?	
5 min.	2. Using flip chart 2, explain Cone of Experience (see opposite) as transition to the discussion of learning outcomes (5 minutes only).	D2. Flip Chart 2, Cone of Experience
10 min.	3. State four criteria for choosing methods (see opposite).	
10 min.	4. State three types of learning and explain (see opposite). Examples of objectives in each domain may be illustrated on a flip chart if necessary to trainees' understanding.	D4. Optional Flip Chart 3, Sample Objectives
10 min.	5. Refer trainees to handout 3 and explain.	D5. Handout 3, Sample Action Words

Points for Discussion

C3. (continued)

3c. With this technique the lecturer can control the kinds of questions he or she is asked. For example, in the preceding lecture the panel was instructed not to ask questions on a specific area. The lecturer can use this device to avoid controversial subjects or subjects with which he or she is unfamiliar.

D. Methods Selection Principles

2. Cone of Experience

a. The cone of experience is not a literal representation of experience levels but simply a visual aid in explaining the various types of audiovisual materials.

b. There is no value hierarchy in the cone, but note that indirect experiences are used most wisely when built on direct experiences.

c. Note difference between levels of abstraction, between verbal and visual receiving, hearing, saying, seeing, and doing.

d. Note memory percentages as they are related to levels of abstraction (inverse order). People remember 10 percent of what they read, 20 percent of what they hear, 30 percent of what they see, and 50 percent of what they read, hear, and see.

3. Choice of method is based on:

a. type of learning outcome,

b. size of learning group,

c. physical resources available, and

d. degree of trainer skills and comfort.

4. All learning objectives can be classified primarily in one of three categories: cognitive, affective, or psychomotor. This division helps the trainer identify the nature of a given task. Once the trainer knows whether the task is mostly thinking, feeling, or doing, he or she can select a method that will produce the kind of learning that is desired.

Note: Emphasize that while all of the domains are involved in any learning act, one of them is usually primary.

5. Often the words used to describe the learning objective reveal the domain in which the learning outcome is desired to be. Handout 3 gives samples of words that may give clues the domain in which the expected learning outcome lies.

Time	Sequence of Activities	Materials
	D. (continued)	
10 min.	6. Individual task a. Refer trainees to handout 4, Types of Learning Task Sheet. b. Instruct trainees to: write an instructional objective in each o the three domains of learning.	D6a. Handout 4, Types of Learning Task Sheet
10 min.	7. Ask for two objectives in each of the three discuss.	
5 min.	8. Refer trainees to handout 5, Appropriate Methods, and discuss. If any confusion about overlapping methods has surfaced, point out that such overlapping is inherent in the category scheme and does no harm.	D8. Handout 5, Appropriate Methods
5 min.	E. Closing Remarks 1. Point out handout 6.	E1. Handout 6, Training of Trainers-Selected Bibliography
	2. Summarize session.	
	3. Link to next session.	

Points for Discussion

D. (continued)

E. Closing Remarks

2. A large amount of information has been conveyed in this session. Even with this high concentration, the subject of methodology has barely been broached. This session should serve as a framework for further independent study, based on the Bibliography distributed.
3. In the next session some specific techniques will be examined in detail.

GOALS/OBJECTIVES: The goal of this session is to familiarize the participants with several training techniques useful to the trainer in alcohol programs.

By the end of the session the participants will be able to:

1. name five specific training techniques and
2. describe the distinguishing characteristics and most appropriate use of each technique.

TIME REQUIRED: 1½ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Lecture
Handout 2, Demonstration
Handout 3, Structured Role Play
Handout 4, Brainstorming
Reference 1, Listening Team Assignments (for preparing 3 x 5 cards)

PRIMARY METHODS: Lecture, listening team, small group exercises

MEETING ARRANGEMENTS: Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 15

Time	Sequence of Activities	Materials
5 min.	A. Opening Remarks	
	1. State purpose of session.	
	2. Name techniques that will be described or used.	
5 min.	B. Listening Team	
	1. Divide trainees into four groups seated at four separate tables.	
	2. Describe listening team technique (see opposite).	
	3. Distribute 3 x 5 cards describing listening team assignments—one to each team.	B3. Reference 1, Listening Team Assignments (for 3 x 5 cards)
	4. Instruct listening teams to:	
	a. listen well to the material on the assigned subject area,	
	b. be prepared to answer the question asked on the assignment card, and	
	c. save all their questions for the end of the lecture.	
30 min.	C. Lecture—Four Selected Adult Learning Techniques	
	1. The Lecture	
	a. Refer trainees to handout 1, Lecture.	C1a. Handout 1, Lecture
	b. Using handout 1 as content source, discuss the lecture as a technique, with emphasis on the purpose of the lecture. (see opposite).	
	2. The Demonstration	
	a. Refer trainees to handout 2, Demonstration.	C2a. Handout 2, Demonstration

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to present a few adult learning techniques in detail.
2. The techniques that will be studied in this session are some that are frequently used by the trainer in alcohol programs. They are:
   - a. lecture (presentation technique),
   - b. demonstration (presentation technique),
   - c. structured role play (simulation technique), and
   - d. brainstorming and the Nine-Dot Exercise (creative thinking).

   During the presentation of the above techniques a second large-audience participation technique—the listening team—will be demonstrated.

B. Listening Team

2. In the listening-team technique each team represents the whole audience for a specific subject or aspect of the lecture. The lecturer addresses his or her remarks on that topic to the assigned listening team and the team may not interrupt during the presentation. The team may ask questions when the presentation is completed.

C. Lecture—Four Selected Adult Learning Techniques

1. The Lecture

   b. In the lecture the emphasis is on the listener—the point is not to cover the field but to have the listener understand the major points being presented.

2. The Demonstration

Time	Sequence of Activities	Materials

C2. (continued)

b. Using handout 2 as content source, discuss the demonstration as a technique, with emphasis on points listed opposite.

3. The Structured Role Play

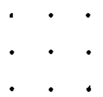
a. Distribute handout 3, Structured Role Play.

Materials: C3a. Handout 3, Structured Role Play

b. Using handout 3 as content source, discuss the role play as a training technique, with emphasis on the purpose of role playing (see opposite).

4. Creative Thinking Exercise:

a. Draw nine dots on a flip chart as follows:



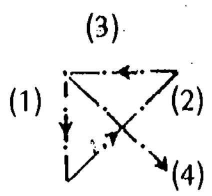
b. Refer to this only as "nine dots"; do not call this a "square" or a "box." Do not answer questions.

c. Instruct trainees to copy these dots and to connect all of the nine dots in the following manner:

- Use only four straight lines.
- Do not retrace a line.
- Do not lift pencil from paper at any time.

d. Allow 5 minutes for confusion to set in.

e. Demonstrate correct solution:



f. Make point about creative thinking: No one told you that you had to stay within an imaginary box. Creative thinking involves breaking out of an imaginary box.

Points for Discussion

C2. (continued)

b. Points fo emphasize in discussion of the demonstration:

(1) The functions of *showing* and *telling* should be kept separate in a demonstration.
(2) Listeners should have the opportunity to practice the technique demonstrated.

3. The Structured Role Play

b. The purpose of structured role play is to instruct. The concepts that the trainer wants to convey should be well thought out ahead of time.

f. The nine dots were never described as a box, yet the trainees had trouble with the solution because they saw the dots as a box.

Session 15

Time	Sequence of Activities	Materials
	C. (continued)	
	5. Brainstorming	
	a. Refer trainees to handout 4, Brainstorming	C5a. Handout 4, Brainstorming
	b. Using handout 4 as content source, discuss brainstorming.	
	c. Brainstorming example:	
	(1) ask trainees to come up with as many uses as they can think of for a ballpoint pen;	
	(2) encourage farfetched uses, such as "a pogo stick for mice."	
	d. Emphasize nonevaluative factor in brainstorming (see opposite).	
15 min.	Break	
10 min.	D. Listening Team Discussion	
	Allow 10 minutes for each team to discuss its assigned discussion question and to formulate questions.	
20 min.	E. Listening Team Report	
	1. Ask each team to present report on its assignment.	
	2. Answer questions from each team.	
5 min.	F. Closing Remarks	
	1. Summarize session.	
	2. Link to next session.	
	3. Ask participants to bring Training Event Planning Guide to the next session.	

Points for Discussion

C. (continued)

5. Brainstorming

d. The trainer should never seem to judge the ideas presented during brainstorming. The emphasis is entirely on quantity of ideas and not at all on quality. If the participants begin to worry about whether or not they have good ideas the effectiveness of the brainstorming will be lost.

Break

D. Listening Team Discussion

There are no discussion points for this section.

E. Listening Team Report

There are no discussion points for this section.

F. Closing Remarks

1. During this session the trainees have had a detailed exposure to several useful training techniques.
2. In the next (and final) methodology session the trainees will consider how to put various techniques together to form a complete learning activity.

GOALS/OBJECTIVES: The goals of this session are to:

1. familiarize the participants with the components of an ideal learning activity and
2. acquaint them with one format for recording a learning activity.

By the end of the session participants will be able to:

1. name 10 of the 16 components of an ideal learning activity and
2. relate those components to specific locations in the sample format.

TIME REQUIRED: 1 hour, 10 minutes

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

- Handout 1, Model Learning Activity
- Handout 2, Case Study: Pathway Residence
- Handout 3, Board/Director Problem Sheet
- Reference 1, Training Event Planning Guide (from session 3)

PRIMARY METHODS: Lecture, small group discussion, large group discussion, panel discussion

MEETING ARRANGEMENTS: Drawing 2, Workshop

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 16

Time	Sequence of Activities	Materials
5 min.	A. Opening Remarks State purpose of session.	
20 min.	B. Group Discussion 1. Ask trainees to refer to page 23 of the TEPG (16 components of an ideal learning activity) and to the design form pages that follow. 2. Discuss each component of learning activity planning and the design forms (see opposite).	B1. Reference 1, Training Event Planning Guide (from session 3).
20 min.	C. Small Group Task—Model Learning Activity 1. Distribute handout 1, Model Learning Activity 2. Instruct trainees to: a. divide into resource groups; b. read the model exercise, handout 1, and discuss its relationship to the list of ideal components on page 30 of the TEPG; and c. select a member to represent the group in the panel discussion that follows.	C1. Handout 1, Model Learning Activity
20 min.	D. Panel Discussion—Model Learning Activity 1. Have panel sit at head of room, facing other trainees. 2. Acting as moderator, have the panel cover the questions listed opposite.	
5 min.	E. Closing Remarks 1. Review purpose of this session. 2. Relate this session to assigned Design Task.	

Points for Discussion

A. Opening Remarks

The purpose of this session is to familiarize the trainees with the components of a well-designed learning activity.

B. Group Discussion

2. Discussion points:

- A well-planned activity must specify *all* information and resources needed by the trainer.
- The design forms were set up to include all of the 16 components listed.
- The forms are not *required* for the Design Task.

C. Small Group Task—Model Learning Activity

There are no discussion points for this section.

D. Panel Discussion—Model Learning Activity

2. Discussion questions:

- Does the model learning activity include all the components listed in the TEPG?
- How could this activity be improved?
- Would it be possible for you to train directly from this activity as written, without further preparation?

E. Closing Remarks

1. The purpose of this exercise has been to give the participants an opportunity to analyze and assimilate the components of an ideal learning activity.
2. The model learning activity studied in this session can be used as an example of the amount of detail necessary for the specific learning activity required in the Design Task.

Session 17 — Content Validation

GOALS/OBJECTIVES: The goal of this session is to impress upon the participants the need to provide a valid source for the content of their training sessions.

By the end of the session participants will be able to:

1. give reasons for validating sources of content and
2. describe at least three kinds of sources that can be tapped in authenticating content.

TIME REQUIRED: 50 minutes

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Content Validation Guide

Handout 2, NCALI Packages

Standard packages of materials may be obtained from the National Clearinghouse on Alcohol Information, Box 2345, Rockville, Md. 20852. Be sure to give NCALI sufficient time (at least 3 weeks) to provide packages.

Handout 3, NCALI Address (prepare from above if there is not enough time to obtain NCALI packages)

Reference 1, Content Choice (for flip chart 1)

PRIMARY METHODS: Lecture, large group discussion

MEETING ARRANGEMENTS: Drawing 6, Informal Discussion

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 17

Time	Sequence of Activities	Materials
5 min.	A. Opening Remarks State purposes of session.	
15 min.	B. Demonstration of Need for Expert Sources 1. Show flip chart 1 to trainees.	B1. Reference 1, Content Choice (for flip chart 1)
	2. Ask trainees to choose the objective for which they prefer to design a session. 3. Ask for a show of hands for those choosing each objective. 4. Discuss (see opposite).	
10 min.	C. Small Group Discussion 1. Ask trainees to share experiences in which they were trainers in a subject with which they were not familiar. 2. Discuss with full group (see opposite).	
15 min.	D. Lecture—Content Validation 1. State purpose of content validation.	
	2. Refer trainees to handout 1. Discuss various "experts" available to the trainer, using handout 1.	D2. Handout 1, Content Validation Guide

Points for Discussion

A. Opening Remarks

The purposes of this session are to introduce the trainee to some of the sources of valid content for training sessions and to increase the trainee's ability to make the best use of the various expert sources available to him or her.

B. Demonstration of Need for Expert Sources

4. Point out that trainers prefer to train on subjects with which they are familiar. However, it is not necessary for trainers to be absolutely familiar with all subjects—expert sources, judiciously used, can compensate for lack of trainer knowledge.

C. Small Group Discussion

2. Elicit the point that rapport between trainer and trainee is lost if the trainer does not have command of his or her subject matter.

D. Lecture—Content Validation

1. The process of content validation has two objectives:
   a. to provide the trainer with a source for content that is not familiar to him or her and
   b. to provide the trainer with a means of validating content that is known to him or her.
2. There are several "experts" upon whom the trainer can call for his or her source material:
   a. The trainer himself or herself is a valid source, providing:
      (1) he or she is sure his or her way of presenting material is effective; or
      (2) he or she is familiar with the background of the material—sources, derivatives, and logic; or
      (3) he or she could do an educated research job on the subject.
   b. The trainees could be the experts if:
      (1) the learning objective involves an affective outcome that can be achieved by group efforts or
      (2) there is enough knowledge among individuals in the group for the trainer to structure a sharing session.

Time	Sequence of Activities	Materials
	D. (continued)	
	3. Discuss content validation (see opposite).	
5 min.	E. Presentation of National Clearinghouse on Alcohol Information Material	
	1. Distribute handout 2, NCALI packages, or handout 3, NCALI address.	E1. Handout 2, NCALI packages (order from Clearinghouse) or handout 3, NCALI address (see first page)
	2. Review contents.	
2 min.	F. Closing Remarks	
	1. Review session.	
	2. State utility of session.	
	3. Link to next session.	

Points for Discussion

D. (continued)

c. Films, tapes, and literature can serve as the expert:

(1) especially when a cognitive application, such as a test, is planned, but

(2) in such a case the content should be discussed by the trainer to show trainees the application and relevance of the materials.

d. Another person may be the expert if he or she is more familiar with the subject matter, able to help with research, or able to present the subject to the group.

e. When an outside expert is brought in, the trainer should be especially careful to see that he or she is familiar with the rationale of the training program and with its goals and objectives.

f. It is helpful to develop a set of questions you want the outside expert to discuss during his or her presentation. These should be reviewed with him or her well before the session to allow time for preparation.

3. The discussion can be led to bring out the following points:

- Content must be valid, but the trainer does not always have to be the source.
- There are two kinds of outside experts:

(1) technical experts, who can impart data in a structured way, and

(2) celebrity experts, who can lend credibility to the program.

E. Presentation of National Clearinghouse on Alcohol Information Material

There are no discussion points for this section.

F. Closing Remarks

1. During this session the trainee has been exposed to sources of content validation and to some means of dealing with outside experts.

2. The ability to properly use outside experts will be of particular help when the trainee returns to his or her own training job where he or she will frequently have need of, or be required to make use of, outside experts.

3. The next two sessions will be devoted to evaluation of the Design Task.

Session 18 — Design Task Evaluation I

GOALS/OBJECTIVES: The goal of this session is to provide experience in evaluating a training design.

By the end of the session participants will be able to rate their partner's Design Task according to evaluation guidelines.

TIME REQUIRED: 3¼ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Evaluation Guide

Handout 2, Numbered 3 x 5 cards

Flip Chart 1, Evaluation Stages (to be prepared from section A2)

PRIMARY METHODS: Lecture

MEETING ARRANGEMENTS: Drawing 6, Informal discussion setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 18

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks	
	1. Explain purpose, allaying any anxiety over evaluation.	
	2. Describe overall evaluation process, using flip chart 1.	A2. Flip Chart 1, Evaluation Stages
4 min.	B. Use of Evaluation Guide	
	1. Refer trainees to handout 1, Evaluation Guide.	B1. Handout 1, Evaluation Guide
	2. Ask all participants to glance through the guide.	
	3. Describe use of the guide.	
2 min.	C. Partner Selection	
	1. Distribute 3 x 5 cards numbered in pairs.	C1. Handout 2, Numbered 3 x 5 cards
	2. Instruct participants to locate their partners by matching numbers.	
4 min.	D. Procedure for Stage I	
	1. Assign each person a partner (persons are not allowed to choose their own evaluator).	
	2. Describe steps (see opposite).	

Design Task Evaluation I

Points for Discussion

A. Opening Remarks

1. The object of this program is not to have the participants produce letter-perfect training designs but to have them return to their jobs with improved skills and knowledge in the training design area. Practice, followed by discussion and analysis of each person's training design, will help each to develop better training sessions.
2. The evaluation will take place in two stages:

   a. In the first stage partners will examine and evaluate each other's Design Tasks.

   b. In the second stage there will be a general discussion of some of the good points of individual plans.

B. Use of Evaluation Guide

3. The Evaluation Guide:

   a. Follows the order of the TEPG.

   b. Has rating points that may be used by each partner to help in the process of evaluation. Use of the rating point system is not required.

   c. Will not be handed in nor even be seen by the trainer.

   d. Is intended to assist the discussion between the partners.

C. Partner Selection

2. Persons are not to choose their own evaluator.

D. Procedure for Stage I

2. This stage of the evaluation proceeds as follows:

   a. Each participant reads his or her partner's Design Task carefully.

   b. Each participant then evaluates that Design Task, using the evaluation guide, if he or she chooses.

   c. Using the formal evaluation as a springboard for the discussion, the partners will then engage in intensive discussions of each other's tasks.

Session 18

Time	Sequence of Activities	Materials
2 min.	E. Closing Remarks 1. Remind participants of time allotted (3 hours). 2. Link to second stage of the evaluation process.	

Points for Discussion

E. Closing Remarks

1. Approximately 3 hours have been allotted for this stage of the evaluation.

2. Once the participants have completed the intensive evaluation which is now beginning, they will be prepared for the group evaluation session that follows.

Session 19 Design Task Evaluation II

GOALS/OBJECTIVES: The goal of this session is to provide participants with the opportunity to examine training plans exhibiting good examples of each of the TEPG planning areas.

Participants will be able to evaluate strengths and weaknesses of selected plans by comparing them to the processes described in the TEPG.

TIME REQUIRED: 1¼ hours

EQUIPMENT:

MATERIALS: (Handouts and references are found in the Participant Workbook.) Handout J, Resource Group Assignments

PRIMARY METHODS: Small group discussion, presentation, and large group discussion

MEETING ARRANGEMENTS: Drawing 1, Round Table setup

Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 19

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks 1. State purpose of session. 2. State sequence of activities.	
30 min.	B. Resource Group Evaluation 1. Divide trainees into resource groups. 2. Refer participants to handout 1. 3. Instruct groups to select from their Design Tasks an especially good example of the process(es) specified on their assignment cards.	B2. Handout 1, Resource Group Assignments
40 min.	C. Presentation of Resource Group Evaluation 1. Ask each group to present the example(s) chosen. 2. Encourage free discussion of the presented examples.	
2 min.	D. Closing Remarks 1. Review events of Design Task week. 2. Link to Delivery Task week.	

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to relate the evaluation of the Design Tasks to the subject areas that have been examined during the preceding sessions.
2. During this session trainees, in their resource groups, will:
   a. Discuss individual tasks from the point of view of one or two of the following subjects:
      (1). Organization Need Analysis,
      (2) Job and Performance Analysis,
      (3) Training Group Analysis,
      (4) Statement of Learning Outcomes,
      (5) Curriculum Building, and
      (6) Evaluation and Feedback.
   b. Following this there will be a full group discussion of good examples of different components of the Design Tasks.

B. Resource Group Evaluation

There are no discussion points for this section.

C. Presentation of Resource Group Evaluation

There are no discussion points for this section.

D. Closing Remarks

1. In the preceding week the trainees have concentrated on preparation for a training session; that is, how to determine training needs and how to plan a curriculum for adult learners.
2. In the next week trainees will have the opportunity to practice and study the actual delivery of a training session segment.

Session 20 Delivery Stage: Overview/Task Assignment

GOALS/OBJECTIVES: The goals of this session are to:

1. acquaint the participants with the flow of the Delivery Task week of the course and
2. give the participants the opportunity to decide on their Delivery Task presentation.

By the end of the session participants will be able to:

1. specify two areas of study in developing delivery skills and
2. select an area for practice.

TIME REQUIRED: 6½ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers, scissors

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Delivery Task Options

Handout 2, Presentation Evaluation Form

Reference 1, Delivery Task Week Flow (for flip chart 1).

PRIMARY METHODS: Lecture, discussion, individual activity

MEETING ARRANGEMENTS: Drawing 6, Informal Discussion setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

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Session 20

Time	Sequence of Activities	Materials
10 min.	A. Opening Remarks	
	1. Review first week of training practitioners' clinic.	
	2. Forecast activities of the second week, using flip chart 1.	A2. Reference 1; Delivery Task Week Flow (for flip chart 1)
15 min.	B. Delivery Task Options	
	1. Refer trainees to handout 1, Delivery Task Options—and explain Delivery Task (see opposite).	B1. Handout 1, Delivery Task Options
	2. Allow time for participants to read handout 1.	
	3. Discuss the options (see opposite for points to emphasize).	
	4. Note availability of physical resources such as flip charts, markers, scissors, etc.	
	5. Answer questions.	
15 min.	C. Presentation Evaluation	
	1. Refer trainees to handout 2, Presentation Evaluation Forms.	C1. Handout 2, Presentation Evaluation Forms

Delivery Stage: Overview/Task Assignment

Points for Discussion

A. Opening Remarks

1. During the first week of the TAT program the trainees concentrated on the design of a learning activity. Two variables that affect the adult learning process—the learner and the methodology—were examined in depth.
2. During the second week, the delivery task period, the trainees will examine the other two variables—the trainer and the environment—that affect the adult learning process. Learning will be structured around content sessions and delivery laboratories. Specifically, trainees will:

   a. study the effects of the physical and psychological climate on training;

   b. learn about feedback, both positive and negative;

   c. develop some small group skills;

   d. present their own learning activities; and

   e. receive evaluation of their learning activities from other participants.

B. Delivery Task Options

1. By this time the trainees have acquired information related to the theory and practice of training. The purpose of the Delivery Task is to give them some actual experience in putting that knowledge to use. By giving the trainees the actual experience of using new methods, the Delivery Task will help them to approach the introduction of new methods back home with greater skill and confidence.

3. Discussion of options—points to emphasize:

   a. Presentations may be done individually or in groups.

   b. Presentations may be segments of the Design Task completed in the previous section of the TPC or may be new techniques entirely.

   c. The feedback section of the last 20 minutes is as important as the presentation itself.

   (1) The participant directs the evaluation and determines in advance which points he or she wishes to be evaluated.

   (2) The evaluation may take any form; i.e., large or small group discussion, use of prepared evaluation instruments, etc.

C. Presentation Evaluation

1. The evaluation forms are passed out at this point to give the trainees some idea of how their delivery task work will be judged.

Time	Sequence of Activities	Materials
	C. (continued)	
	2. Discuss the forms (see opposite for points to emphasize).	
	3. Answer questions.	
60 min.	D. Choice Period	
	1. Instruct trainees to take an hour to decide on their task and determine the manner of presentation.	
15 min.	E. Return of Trainees	
	1. Ask trainees to write down subject and manner of chosen presentation.	
	2. Ascertain schedule preferences (who would like to be first, in morning or afternoon).	
	3. State that each trainee will be given 20 minutes for delivery and evaluation.	
5 min.	F. Closing Remarks	
(4½ hrs.)	1. Four and one-half hours included for preparation of the Delivery Task.	
	2. Link to next session.	

Points for Discussion

C. (continued)

2. Discussion of evaluation forms—points to emphasize:

   a. The evaluation forms may be altered by the participants at will—evaluation parts may be added, sections may be left out, etc. Presenters should review the forms and select those items they want used in this evaluation.

   b. The forms, if used, need not be collected nor seen by the trainers.

   c. The rating scales are intended to facilitate evaluation and do not represent a formal score on the presentation.

D. Choice Period

There are no discussion points for this section.

E. Return of Trainees

There are no discussion points for this section.

F. Closing Remarks

2. The next session, Physical Learning Climate, will be the first content session on learning activity delivery.

Session 21 — Physical Learning Climate

GOALS/OBJECTIVES: The goal of this session is to make the participants aware of the importance of setting the physical learning climate for a training session.

Participants will be able to construct a physical learning climate checklist for their own future use in their own training environment using the NCAE checklist as a guide.

TIME REQUIRED: 1¼ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)

Handout 1, Conference Facilities Request Form

Handout 2, Conference Task Analysis

Handout 3, A Physical Learning Climate Checklist

PRIMARY METHODS: Lecture, discussion, individual task

MEETING ARRANGEMENTS:

Drawing 6, Informal Discussion setup

Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 21

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks 1. State purpose of the day's sessions. 2. State sequence of activities.	
10 min.	B. Lecture—The Physical Learning Climate 1. Define climate. 2. Note need for physical comfort. 3. Note two physical comfort factors often overlooked by the trainer.	
15 min.	C. Discussion—Aspects of the Physical Learning Climate 1. Refer participants to handouts 1 and 2. 2. Ask them to read forms. 3. Discuss the forms from viewpoint of effect on physical comfort (see opposite).	C1. Handout 1, Conference Facilities Request Form Handout 2, Conference Task Analysis
30 min.	D. Individual Task—Developing a Training Needs Checklist 1. Refer participants to handout 3, A Physical Learning Climate Checklist.	D1. Handout 3, A Physical Learning Climate Checklist

Points for Discussion

A. Opening Remarks

1. This session and the session following both deal with the "climate," or environment and atmosphere, in which learning takes place. The purpose of these sessions is to show the trainees how the learning climate can be defined and understood and how it can be manipulated for maximum training effectiveness.

2. There will be two learning climate sessions:

   a. The first session will deal with the physical environment.

   b. The second will focus on the psychological atmosphere.

B. Lecture—The Physical Learning Climate

1. The word "climate" is used in this session to mean the complex network of messages that are communicated from the physical, organizational, and psychological environment.

2. The most important requirement of the physical climate for an adult learning session is that it be comfortable and not detract from the material being presented. If the learners are made uncomfortable by noise, hard chairs, or lack of ventilation, they will be less able to concentrate on material.

3. Two physical factors pertaining to the training session are often overlooked. They are:

   a. The movement of the trainees to and from the training site. If directions are not clear and accurate or if parking is very difficult, the resulting frustration can be an obstacle to learning.

   b. The introduction of trainees to each other. Such measures as use of tags or introduction exercises should be taken to help trainees get acquainted easily.

C. Discussion—Aspects of the Physical Learning Climate

3. Discussion points:

   - Point out the function of each form and note how the elements are arranged.
   - How could the forms be improved?
   - What factors affecting physical environment have been left off?

D. Individual Task—Developing a Training Needs Checklist

There are no discussion points for this section.

Session 21

Time	Sequence of Activities	Materials

D. (continued)

2. Instruct trainees:
   a. using the handout as a guide, to develop a checklist with additional detail for their own training situation, as desired.
   b. to discuss the task with other trainees when completed.

15 min. E. Large Group Discussion—Training Needs Checklist

1. Ask trainees to share innovative or interesting ideas that arose during the individual task.
2. Make teaching points (see opposite).

2 min. F. Closing Remarks

1. Review purpose of session.
2. Link to next session.

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Points for Discussion

D. (continued)

E. Large Group Discussion—Training Needs Checklist

2. Teaching points:
   - Physical settings always make a difference to the learning climate.
   - The trainer can manipulate the physical setting.
   - The trainer should be aware of the tendency of trainees to develop their own turf; to prevent this, the trainer should keep the trainees moving from seat to seat.
   - In general it is preferable not to get involved with serving meals to trainees: the choice of menu, etc. may detract from the "sticking-to-business" objective of a training session.

F. Closing Remarks

1. In this session the trainees have investigated the effect of the physical setting on the adult learning process.
2. In the next session the psychological setting of a learning session will be studied.

Session 22 — Psychological Learning Climate

GOALS/OBJECTIVES: The goal of this session is to familiarize participants with elements of the psychological learning climate and ways of controlling it.

By the end of the session participants will be able to:

1. name three of the five points in the openness continuum and
2. give an example of the kind of interview goal that can be best achieved through each of these three continuum points.

TIME REQUIRED: 1 hour

EQUIPMENT: Flip chart paper, tripod or masking tape, markers

MATERIALS: (Handouts and references are found in the Participant Workbook.)
Handout 1, Setting a Learning Climate
Reference 1, The Openness Continuum (for flip chart 1)
Flip charts 2, 3, and 4, Sample Target Groups (to be prepared from section C2)

PRIMARY METHODS: Lecture, group discussion, pair exercise

MEETING ARRANGEMENTS: Drawing 6, Informal Discussion setup
(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 22

Time	Sequence of Activities	Materials
5 min.	A. **Opening Remarks** State purpose of session.	
10 min.	B. **Lecture—The Psychological Learning Climate** 1. State the reason for studying the psychological learning climate. 2. State the relationship of the trainer to the psychological learning climate. 3. State the best time to set a learning climate. 4. The Openness Continuum. a. Using flip chart 1, review points on the continuum (see opposite). b. Relate the openness continuum to training.	B4. Reference 1, The Openness Continuum (for flip chart 1)

Points for Discussion

A. Opening Remarks

The purpose of this session is to give the trainees the opportunity to develop an awareness of and to practice control over the psychological learning climate of a training group.

B. Lecture—The Psychological Learning Climate

1. The psychological learning climate is important because:

   a. Learning cannot take place if the learner is under threat, feels anxious, or is in any psychologically uncomfortable state.

   b. In order for learning to occur it is necessary to have a learning atmosphere in which the trainees feel relaxed and accepted.

2. The trainer is responsible for establishing the psychological climate and a successful trainer will usually devote about 25 percent of his or her energies to creating the climate most conducive to learning.

3. The best time to set a good learning climate is at the beginning of the training session, when the learners are ready to get down to business. However, at the beginning of a session the trainees are likely to feel a bit awkward about the session and about each other; the trainer should attempt to establish a free, open atmosphere from the beginning.

4a. The degree of openness may be thought of as lying on a continuum, from least open to wide open. Points on the openness continuum are as follows:

   (1) Least open—discussion of impersonal things, such as "our work" or "what we do in our region." Good for high-content delivery.

   (2) More open—personal discussion, such as "my work" or "what I do." This stage is good for job training.

   (3) Still more open—personal but factual discussion, such as "what I like or dislike about my job." Still good for training.

   (4) Focused openness—nonfactual, affective discussion, such as "what I'm afraid of" or "what I do badly or well." Good for achieving affective goals.

   (5) Points beyond this are not usually appropriate for task-oriented training groups but are appropriate for counselor training programs and the like.

b. The trainer should consider the openness continuum in his or her planning:

   (1) He or she should consciously decide which point on the continuum will best enable him or her to achieve his or her training objectives, as the degree of openness is in direct relationship to the nature of the goals and the success of training.

   (2) An inappropriate degree of openness is often the cause of problems in a training session.

Session 22

Time	Sequence of Activities	Materials
10 min.	C. Group Discussion—Selecting the Appropriate Degree of Openness	
	1. Uncover flip charts showing target groups and training goals one by one.	C1. Flip Chart 2, 3, and 4, Sample Target Groups
	2. For each target group, have trainees discuss what degree of openness would be appropriate (see opposite).	
30 min.	D. Pair Exercise—Controlled Openness Interviewing	
	1. Divide trainees into pairs.	
	2. Instruct one member of each pair to interview the other member, taking 5 minutes, and finding out: a. one thing the interviewee likes about his or her job, b. one thing he or she dislikes about it, c. one thing that interests him or her, and d. one thing that motivates him or her.	
	3. Instruct trainees to reverse roles and repeat exercise.	
	4. Reconvene participants.	
	5. Lead discussion of exercise, using discussion questions opposite if necessary.	

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Points for Discussion

C. Group Discussion—Selecting the Appropriate Degree of Openness

2. Sample target groups and training goals:

- Physicians—inform about new treatment facility
- Senior Army officers—inform about Army regulations
- Inservice counselor training—empathy training

Appropriate degrees of openness for the sample target groups:

- Physicians—least open because this situation requires a high-content delivery.
- Senior Army officers—least open because officers are more used to a highly structured learning environment and are more comfortable in it.
- Inservice counselor training—focused openness because it is appropriate for achievement of affective goals.

D. Pair Exercise—Controlled Openness Interviewing

2. The purpose of this exercise is for each interviewer to experience the feeling of control over the interview and to discover the kind of openness and trust levels he or she can establish.

5. Discussion questions:

- Was it easier to be the interviewer or the interviewee?
- Was a degree of trust between partners established?
- Did each interviewer know what information he or she was after and how to get it?
- Did the interviewer feel that the communication was under his or her control?

Session 22

Time	Sequence of Activities	Materials
5 min.	E. Closing Remarks	
	1. Refer trainees to handout 1, Setting a Learning Climate.	E1. Handout 1, Setting a Learning Climate
	2. Ask trainees to read handout 1, which summarizes the points made about the psychological climate, on their own time.	
	3. Summarize the two sessions on learning climate.	
	4. Link to next session.	

Points for Discussion

E. Closing Remarks

3. In these two sessions the importance of trainer control of the physical and psychological learning climates has been examined and trainees have been exposed to some means of controlling both climate elements.
4. The trainees, now that they have learned about the elements of the learning climate, may wish to apply this knowledge immediately to their Delivery Tasks in the work session that follows.

Feedback I

GOALS/OBJECTIVES:	The goal of this session is to familiarize participants with the process of giving and receiving feedback and various kinds of feedback between persons. By the end of the session participants will be able to: 1. distinguish between the three feedback levels of observation, inference, and feeling and 2. name three forms of environmental feedback not commonly noticed.
TIME REQUIRED:	40 minutes
EQUIPMENT:	Flip chart paper, tripod or masking tape, markers
MATERIALS:	Flip Chart 1, Types of Feedback (to be prepared from section B) Flip Chart 2, Feedback Process (to be prepared from section B)
PRIMARY METHODS:	Lecture, individual and pair exercises, discussion
MEETING ARRANGEMENTS:	Drawing 6, Informal Discussion setup (See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 23

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks. State purposes of this session.	
5 min.	B. Lecture—Feedback	
	1. State purpose of studying feedback.	
	2. State types of feedback.	B2. Flip Chart 1, Types of Feedback
	3. State advantages of good communication levels.	
	4. Discuss listening and being attuned to feedback.	
15 min.	C. Eye Focus Exercise	
	1. State purpose of exercise.	
	2. Divide trainees into pairs.	

Points for Discussion

A. Opening Remarks

The purposes of this session are to enable the trainees to develop an awareness of the ever-present phenomenon of feedback and to help them acquire skills in communication and feedback.

B. Lecture—Feedback

1. By studying how feedback works it is possible to develop ways of improving it as a source of communication between trainer and trainee.

2. Feedback may be:

   a. verbal, in the case of content feedback, or

   b. nonverbal, when psychomotor activity is involved.

   c. When verbal and nonverbal messages are in harmony the communication is experienced as genuine and believable.

3. Empirical evidence indicates that the better the communication level is, the better the training situation will be in terms of:

   a. openness,

   b. learning,

   c. creativity,

   d. work, and

   e. goal achievement.

4. The trainer needs to monitor the feedback from the learner in order to direct the flow of the learning activity. Listening to feedback is a three-step process:

   a. Observation, including:

      (1) hearing the verbal content of the messages,

      (2) hearing the feeling tone behind the words, and

      (3) seeing the nonverbal messages transmitted by movements.

   b. Inference, or drawing conclusions from incoming data. Such inferences may always be checked with the learner for accuracy.

   c. Emotions or feelings, which should always be acknowledged, so that reactions on the basis of past experience may be prevented from interfering with present learning conditions.

C. Eye Focus Exercise

1. The purpose of the following exercise is to demonstrate to the trainees how much input is being transmitted constantly by the "here and now" environment.

Time	Sequence of Activities	Materials

C. (continued)

3. Delivering instructions smoothly and slowly, with pauses where appropriate, tell trainees to:
   a. Lock eyes with partners.
   b. Listen to other sounds, the sounds that are always present in the room, such as the:
      (1) ventilation,
      (2) chairs squeaking,
      (3) sounds in the foyer, and
      (4) sounds of other people in the building as a whole.
   c. Move hands to the side of the head, just beyond the limits of peripheral vision.
4. Discuss exercise, using discussion questions opposite if necessary.

15 min. D. Here and Now Exercise

1. Divide trainees into pairs.
2. Instruct one member of the pair to ask the other to tell what he or she observes and then remain silent.
3. Instruct the other member of each pair to describe to the first exactly what he or she is observing at the present moment, in the here and now, with no inferences, feelings, or conclusions.
4. Allow 3 minutes for the exercise.
5. Instruct trainees to reverse roles and repeat exercise.
6. Discuss the exercises, using questions for discussion opposite if necessary.

Points for Discussion

C. (continued)

4. Discussion questions:

- What new sounds did the trainees hear that they were unaware of before the exercise?
- Were they aware of the extent of their peripheral vision as shown by moving their hands with their eyes locked forward?
- Can feedback from the environment ever be totally prevented?

D. Here and Now Exercise

6. Questions and points for discussion:

- Was it possible to limit what was being described absolutely to the here and now?
- Was it difficult for the partner receiving the feedback to remain silent?
- People want to put a meaning to or make an inference from what they observe; this is what gives rise to subjective feeling.

Session 23

Time	Sequence of Activities	Materials
2 min.	E. Closing Remarks 1. Review session. 2. Link to next session.	

Points for Discussion

E. Closing Remarks

1. During this session the trainee has been shown that feedback is present in every situation, even the most controlled, and it is necessary for him or her as a trainer to be receptive and aware of this feedback.
2. In the next session the trainee will learn about the two kinds of feedback: negative and positive.

GOALS/OBJECTIVES:	The goal of this session is to increase understanding of and skill in receiving and giving useful feedback. By the end of the session participants will be able to: 1. name three of the five rules of giving feedback and 2. apply all five rules by critiquing a dramatization in which negative feedback is given.
TIME REQUIRED:	1½ hours
EQUIPMENT:	Flip chart paper, tripod or masking tape, markers
MATERIALS: (Handouts and references are found in the Participant Workbook.)	Handout 1, Rules of Feedback Flip Chart 1, Negative Feedback Task Instructions (optional: to be prepared from section C) Flip Chart 2, Positive Feedback Task Instructions (optional: to be prepared from section D)
PRIMARY METHODS:	Lecture, group dramatization, discussion
MEETING ARRANGEMENTS:	Drawing 6, Informal Discussion setup Drawing 2, Workshop setup (See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 24

Time	Sequence of Activities	Materials
3 min.	A. Opening Remarks 1. State purpose of this session. 2. State sequence of activities.	
15 min.	B. The Rules of Feedback 1. Refer trainees to handout 1, Rules of Feedback. 2. Review the five rules.	B1. Handout 1, Rules of Feedback
35 min.	C. Negative Feedback Exercise 1. Set up exercise: a. Make introductory remarks. b. Describe exercise. c. Divide trainees into groups of four or five. d. Instruct all trainees that the dramatization should be constructed around a training, management, or counseling situation, with one person playing the role of trainer, and the rest as participants. e. Instruct half of the groups to prepare a dramatization in which the trainer receives negative feedback. f. Instruct remaining groups to prepare a dramatization in which trainer gives negative feedback. g. Stress that these dramatizations should illustrate the right way of dealing with negative feedback. 2. Allow preparation time.	C1e. Flip Chart 1, Negative Feedback Task Instructions (optional)

Points for Discussion

A. Opening Remarks

1. The purpose of this session is to give the trainees practice in giving and receiving the two kinds of feedback: positive and negative.
2. This will be accomplished through two group dramatizations that will illustrate the correct way to handle each type of feedback.

B. The Rules of Feedback

2. Rules of feedback:
   a. It should be requested by the recipient and remain under his or her control.
   b. It should be specific and refer to things, places, and events; not people.
   c. It should be directed to behavior or events which are amenable to change.
   d. It should be current.
   e. It should be related to, and limited to, the goals and objectives of the training program.

C. Negative Feedback Exercise

1a. Both giving and receiving negative feedback arouses anxiety—the one because it raises fears of being destructive, and the other because it might lead to being hurt. The purpose of this exercise is to give practice in handling negative feedback situations.

b. In the exercise the trainees will divide into groups of not more than four or five. Each group will have 15 minutes to prepare a dramatization of a situation involving negative feedback. Each group will then present the dramatization to the others.

Time	Sequence of Activities	Materials
	C. (continued)	
	3. Present dramatizations: a. Limit each dramatization to 5 minutes. b. Discuss each dramatization, using discussion questions opposite as needed.	
35 min.	D. Positive Feedback Exercise 1. Set up exercise: a. Make introductory remarks. b. Describe exercise. c. Repeat all steps of previous exercise, substituting positive for negative feedback.	D1c. Flip Chart 2, Positive Feedback Task Instructions (optional)
2 min.	E. Closing Remarks 1. Review purpose of session. 2. Link to next session.	

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Points for Discussion

C. (continued)

3b. Discussion questions:

- What principles of feedback did the dramatization illustrate?
- What rules were violated?
- Is negative feedback better presented verbally or nonverbally?

D. Positive Feedback Exercise

1a. Positive feedback also arouses anxiety—the giver wonders if he or she is being sincere and the receiver questions whether the feedback is real.

b. The feedback exercise just completed will now be repeated to illustrate the techniques of giving and receiving positive feedback.

E. Closing Remarks

1. The purpose of this session has been to give the trainees practice in the difficult art of giving and receiving feedback.
2. The ability to give and receive feedback is especially important in dealing with small groups, which will be the subject of the next session.

Session 25 — Small Group Skills

GOALS/OBJECTIVES: The goals of this session are to:

1. introduce the participants to the technique of observing group processes and
2. familiarize the participants with some ways of making interventions in the group activity.

By the end of this session participants will be able to:

1. demonstrate their understanding of observation techniques by selecting appropriate examples from a group dramatization to illustrate communication patterns, group decisionmaking, and group needs and
2. analyze and evaluate intervention techniques suggested by trainee group for one resolution of a critical incident.

TIME REQUIRED: 2½ hours

EQUIPMENT: Flip chart paper, tripod or masking tape, markers, video tape equipment, large name badges for role players to wear to identify their characters, paper and pencils

MATERIALS: (Handouts and references are found in the Participant Workbook, except handout 2, Role Descriptions (in Section IV of this manual.)

Handout 1, What to Observe in a Group

Handout 2, The Situation Role Descriptions

Handout 3, Group Process Note Sheet

Handout 4, Interventions

Handout 5, Bypasses for Roadblockers

PRIMARY METHODS: Lecture, group dramatization, discussion, small group exercise

MEETING ARRANGEMENTS: Drawing 6, Informal Discussion setup

Drawing 2, Workshop setup

(See "Illustrations of Various Meeting Arrangements" in section IV of this manual.)

Session 25

Time	Sequence of Activities	Materials
	A. Preliminary	
	1. Secure eight volunteers to take part in the following group dramatization.	
	2. Tell them they will be playing parts, to be described later, to illustrate group interactions.	
5 min.	B. Opening Remarks	
	1. State purpose of this session.	
	2. State sequence of activities.	
15 min.	C. Lecture—What to Observe in a Group	
	1. Refer trainees to handout 1, What to Observe in a Group, which is the basis for the lecture.	C1. Handout 1, What to Observe in a Group
	2. Discuss techniques of group observation.	
	3. Review the three stages of an evolving group.	
	4. Answer questions.	
60 min.	D. Group Dramatization—Staff Meeting	
	1. Describe activity.	

Points for Discussion

A. Preliminary

There are no discussion points for this section.

B. Opening Remarks

1. The purpose of this session is to introduce the trainees to the subject of group observation and to the techniques of intervention, as well as to give them practice in using small-group skills.
2. This session will center around two activities:
   a. a dramatization that will serve as a model for group observation and
   b. small-group dramatizations of intervention techniques.

C. Lecture—What to Observe in a Group

2. Group observation:
   a. Group observation should include both content and process:
      (1) Process is what is happening in the present.
      (2) Content is what is being discussed and usually derives from the past.
   b. Communication patterns (Who talks to whom? When? Who leads the discussion? Who influences decisions?) are important observation points.
   c. The observer should notice how the group finally acts: how the decisions are made and by whom.
3. The needs and productivity of a group change with its age. There are three principal stages in the evolution of a group:
   a. Infancy—The group is a collection of individual personalities displaying approach/avoidance behavior to one another. The trainer will need to give personal attention to each member.
   b. Adolescence—The group may now be characterized by aggressiveness, as the individuals form factions and partnerships and leadership and group norms are established.
   c. Maturity—The group has solved its group conflicts and is ready to proceed with the task at hand. Rarely is a group able to devote more than one-third of its allotted meeting time to the actual task.

D. Group Dramatization—Staff Meeting

1. Eight trainees have consented to dramatize a classic group situation—the staff meeting—for the benefit of the rest of the course members. Each of the eight has been assigned a role to play but none knows the role of the others; therefore, they will be reacting to each other's roles in a real way. Following the 15-minute dramatization there will be a video tape replay of it for further observation and then a discussion of the group dynamics that were exhibited in the dramatization.

Time	Sequence of Activities	Materials
	D. (continued)	
	2. Assign roles to volunteers and pass out a description of each role to the appropriate individual. (Participants are to see only their own role descriptions.) Give each a badge with the name of the character he or she will play.	
	3. Refer group to handout 2, The Situation. Allow time for trainees to read it.	D3. Handout 2, The Situation
	4. Have volunteers present the dramatization.	
	5. Introduce video tape replay.	
	6. Refer trainees to handout 3, Group Process Note Sheet and advise all viewers to make notes on processes they will witness.	D6. Handout 3, Group Process Note Sheet
	7. Run video tape.	
	8. Discuss the dramatization, using questions for discussion opposite if necessary.	
	9. Ask the role players to read their character statements to the audience.	
	10. Summarize dramatization and link to intervention section of session.	
10 min.	Break	
10 min.	E. Lecture—Intervention Techniques	
	1. Refer trainees to handout 4, Interventions—and handout 5, Bypasses for Roadblockers—and allow time for participants to look over briefly.	E1. Handout 4, Interventions Handout 5, Bypasses for Roadblockers
	2. Define intervention.	
	3. Review when interventions are made.	

Points for Discussion

D. (continued)

4. In order to allow the role players a chance to observe group process the dramatization will be viewed on video tape.

8. Questions for discussion:

   - What kinds of communications patterns were observed?
   - How were group decisions made?
   - What group needs and individual needs were evidenced?
   - Who made attempts to focus the task or to lead the group?
   - Who agreed or disagreed with whom?

10. During this dramatization trainees have been shown what to look for in the small group process. In the last part of the session they will learn what to do or say when they observe the group getting off track.

E. Lecture—Intervention Techniques

1. The handouts show several types of interventions. The major kinds are task and climate interventions. Interventions may use humor, if appropriate.

2. An intervention is an interruption of an ongoing group activity that influences the direction, content, behavior, or climate of a group.

3. Interventions are made:

   a. When a group needs to be moved from a nonproductive area to a productive one.

   b. When the work on the task needs to be speeded up.

Time	Sequence of Activities	Materials
	E. (continued)	
	4. Review who can make an intervention.	
	5. Review why interventions are made.	
10 min.	F. Group Discussion—Intervention Techniques 1. Ask trainees to give examples of interventions from the staff meeting dramatization observed earlier. 2. Read critical incident situation (see opposite). 3. Discuss how to handle the incident, using questions for discussion (see opposite).	
40 min.	G. Small Group Exercise—Intervention Techniques 1. Describe activity (see opposite). 2. Divide trainees into groups of four. 3. Allow 15 minutes for preparation. 4. Have groups read their incidents: a. Allow 5 minutes for each presentation and discussion. b. Use questions opposite for discussion after each presentation.	

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E. (continued)

4. The intervention can be made by a group member as well as the trainer. If a nonproductive situation continues for long enough, the intervention will usually be made by a group member; however, the trainer normally steps in to speed up the process.

5. Interventions are made to:

   a. maintain the balance of a mature group,

   b. maintain the group process centering on the task, and

   c. maintain the learning climate of the group.

F. Group Discussion—Intervention Techniques

2. Critical incident—A trainer is in the middle of a training session. Participant X comes in late again and begins asking questions. This is the second day of the course, and he or she has done this three different times. No one has yet called it to his or her attention.

3. Questions for discussion:

   • Should the trainer intervene?
   • If so, how, and when?
   • Ask trainees how they would handle the situation.

G. Small Group Exercise—Intervention Techniques

1. Small groups will construct a critical incident, such as the one just discussed, including an example of intervention by a trainer.

4b. Questions for discussion:

   • Why was this form of intervention chosen?
   • What other interventions were considered?
   • Was the intervention climate- or task-related?
   • What was the effect of the dramatization?

   Teaching points to elicit:

   • Interventions are influenced by many variables.
   • They are very unpredictable.
   • Interventions can be detrimental as well as useful.

Session 25

Time	Sequence of Activities	Materials
10 min.	H. Closing Remarks	
	1. Summarize session.	
	2. Link to Delivery Task presentation period.	

Points for Discussion

H. Closing Remarks

1. During this session the participants have learned that the trainer is constantly observing the trainees and how their activities conform to the goals and objectives of the program. He or she has learned how to make an intervention in a group process to protect the learning climate and/or to focus the task.
2. The rest of the training program will be devoted the presentation of the Delivery Tasks by the trainees.

Session 26. Delivery Task Presentation and Evaluation

GOALS/OBJECTIVES: The goals of the Delivery Task presentation are to:

1. give the participants practice in using unfamiliar delivery techniques and
2. give them experience in observing and evaluating delivery techniques of others.

During the presentation period participants will deliver their own learning activities and evaluate presentations by others. Because this part of the training program is performed by the trainees themselves, the few notes given on this session refer to the beginning of the session and are inserted to remind the trainer of some important points to make before the presentations begin.

TIME REQUIRED: Depends on the number of participants. Allow at least 40 minutes for each presentation.

EQUIPMENT: Participants should be responsible for equipment for activities. Video tape equipment is recommended for the evaluation activity for playback and assessment.

MATERIALS: (Handouts to be found in the Participant Workbook.) Make sure there are plenty of evaluation guides available; participants are responsible for providing their own materials.

Handout 1, Evaluation Guide (from session 18)

Reference 1, Presentation Schedule (prepare ahead of time)

PRIMARY METHODS: Depends on particular presentation.

MEETING ARRANGEMENTS: Depends on particular presentation.

Session 26

Time	Sequence of Activities	Materials
	A. Opening Remarks	
	1. Introduce presentation period.	
	2. State role of trainer during the presentation period.	
	B. Reminders to Trainees	
	1. Instructions to evaluators.	B1. Handout 1, Evaluation Guide (from session 18)
	2. Time:	
	a. Announce time restraints.	
	b. Announce schedule of Design Task presentations.	B2b. Reference 1, Presentation Schedule
	C. Design Task Presentations	
	1. Turn session over to first presenter.	
	2. Following each presentation, have presenter ask for comments, as time allows.	
	D. Closing Remarks	

Delivery Task Presentation and Evaluation

Points for Discussion

A. Opening Remarks

1. The final section of the training session will be devoted to the presentation of individual trainee's Delivery Tasks.
2. During the presentation period the trainer will turn the course over to the trainees:

   a. Trainees will deliver the activities.

   b. Trainees will evaluate the deliveries.

   c. Trainees making presentations should consider the trainers to be members of the group.

B. Reminders to Trainees

1a. Presenters may wish to have audience evaluate them in specific areas, in which case they should notify the audience before starting the presentation.

b. Presenters are to select two trainees to act as intensive evaluators before the beginning of the presentation.

c. Presenters are to make sure the audience has enough copies of the evaluation guide if use of this aid is desired.

2a. Presenters will be held to the allotted amount of time, give or take a few seconds.

C. Design Task Presentations

There are no discussion points for this section.

D. Closing Remarks

1. Thank trainees for their presentations and ask if there are any final questions or comments.
2. Briefly review the major topics of the training course.

Appendixes

Contents

Secretary's Role

The Secretary has only been on the job 2 months and has received no training or education about alcohol or alcoholic people. He or she is afraid of "drunks." He or she is also reluctant to admit this fear to anyone "around this place," He or she needs the job and wants to succeed.

Senior Counselor's Role

The Senior Counselor is an A.A. member. All he or she knows about Antabuse is what he or she has heard in A.A., and the information has been contradictory. The other counselors in the agency are in the same situation. The senior counselor is suspicious of "shrinks" and believes chemotherapy to be an extreme measure. He or she loves A.A. and is very defensive about its effectiveness. The senior counselor does not know the interviewer and is suspicious of his or her motives.

Director's Role

The Director feels that time spent on paperwork is not as valuable as time spent in counseling. Therefore, the staff has never been taught how to keep client records and some organizational priorities would have to change before the proper atmosphere would exist to support careful recordkeeping.

The director is reluctant to admit this even to himself or herself. He or she usually blames the staff for poor records.

Role Descriptions

[Note to trainer: Copy and pass roles out individually, one to a player. Do not give players copies of roles other than their own.]

Director:

You are treatment-oriented, care about your staff and patients, and believe agency decisions should be made democratically by the staff. You are impatient with administrative details and leave the bulk of the paperwork to the administrator.

Administrator:

You are hard working and overworked. You do not believe your role is to make administrative decisions for the agency, but you are more than willing to carry out those requests that the director makes of you.

Social Worker:

You are young, intelligent, and well trained in clinical social work but lack agency experience. You often feel unsure of yourself, discouraged with your mistakes, and anxious to learn from others more experienced.

Psychologist:

Relatively new to the agency, you believe it lacking in both firm direction and good administration and believe you could do a better job at both. You are a good psychologist, however, and believe you can catch more flies with honey than vinegar.

Counselor I:

You are easygoing, likable, and willing to go along with any decision. You have a good sense of humor and like to clown.

Counselor II:

You are well trained, have 2 years' experience, and are very serious and intense about your work. You believe the psychologist is just what the agency needs.

Counselor III:

You have been sober for 3 years and have been a counselor for approximately a year. You rely heavily on A.A. for help with your clients. You have trouble staying in the here and now.

Counselor IV:

You are middle aged, have a wealth of experience in a variety of agencies (both good and bad), and are in A.A. 12-step work. Your modest salary is supplemented by a generous Army pension (you retired as a full colonel). You are mature, wise, and moderate. The grateful benefactor was your client.

Obtaining Resource Materials

The facilitator will need a copy of each of the following books, which contain important content covered in various sessions of the training program. These materials may be available from your public library or other local educational resource center such as a community college or university extension.

Goal Analysis (for use in TAT session 4)

Robert F. Mager
Lear Siegler, Inc./Fearon Publishers
6 Davis Dr.
Belmont, Calif. 94002

Analyzing Performance Problems (for use in TAT session 8)

Same author and publisher

Preparing Instructional Objectives (for use in TAT session 12)

Same author and publisher

A Note to the Trainer Regarding Needs Assessment

The target audience for whom this training program was designed is described on page 2 in section I of this manual. On the following pages are forms to help determine more precisely the needs and interests of the target audience as a basis for planning a minicourse or some other modification of the total course.

Two sets of forms are provided: one for selecting a minicourse and one for selecting individual sessions. Each set consists of two parts: an assessment form to send to prospective participants and worksheets for tabulating their responses.

The assessment form should be sent to prospective participants along with a cover letter announcing the course dates, location, and other descriptive information, as well as instructions for completing and returning the form.

The tabulation of responses can be accomplished by using the appropriate worksheets. Step-by-step instructions are included for determining the minicourse or session most participants are interested in.

The assessment forms and tabulation worksheets provided are:

- Minicourse Assessment Form
- Tabulation of Minicourse Assessment Forms
- Session Assessment Form
- Tabulation of Session Assessment Forms

Please note that these forms are provided only as models and may be adapted by the trainer to fit a particular situation.

Minicourse Assessment Form

(for 1 to 2 days of training)

The training program you are invited to apply to attend will last:
(to be checked by trainer)

1 day ☐

2 days ☐

****

In the space provided below, rank the following minicourse topics in the order that represents your strongest training needs. (1 = strongest; 5 = weakest)

(A) Assessing Organizational Training Needs—learning how to identify agency needs, problems, and concerns that can be addressed by training (1 day)

(B) Assessing Individual Training Needs—learning how to ascertain the training needs of agency staff (1 day)

(C) Defining Training Outcomes—learning how to define the outcomes/expectations of a training event (2 days—do not select if program runs only 1 day)

(D) Adult Education Theory and Techniques—how adults learn and how their learning is facilitated (1 day)

(E) Training Group Discussion Leader—how to get groups of adult learners to work productively (1 day)

	Letter	*Full Title of the Minicourse*
1.		
2.		
3.		
4.		
5.		

Tabulation of Participant Minicourse Assessment Forms

(for 1- to 2-day program)

1. Count up the number of 1 ratings received for each minicourse and multiply by 5 to get course score:

Minicourse	# of 1 ratings		Score
A. Assessing Organizational Training Needs		X 5	______
B. Assessing Individual Training Needs		X 5	______
C. Defining Training Outcomes		X 5	______
D. Adult Education Theory and Techniques		X 5	______
E. Training Group Discussion Leader		X 5	______

2. Count up the number of 2 ratings received for each minicourse and multiply by 4 to get score:

Minicourse	# of 2 ratings		Score
A. Assessing Organizational Training Needs		X 4	______
B. Assessing Individual Training Needs		X 4	______
C. Defining Training Outcomes		X 4	______
D. Adult Education Theory and Techniques		X 4	______
E. Training Group Discussion Leader		X 4	______

3. Count up the number of 3 ratings received for each minicourse and multiply by 3 to get score:

Minicourse	# of 3 ratings	Score
A. Assessing Organizational Training Needs	X 3	
B. Assessing Individual Training Needs	X 3	
C. Defining Training Outcomes	X 3	
D. Adult Education Theory and Techniques	X 3	
E. Training Group Discussion Leader	X 3	

4. Count up the number of 4 ratings received for each minicourse and multiply by 2 to get score:

Minicourse	# of 4 ratings	Score
A. Assessing Organizational Training Needs	X 2	
B. Assessing Individual Training Needs	X 2	
C. Defining Training Outcomes	X 2	
D. Adult Education Theory and Techniques	X 2	
E. Training Group Discussion Leader	X 2	

5. Count up the number of 5 ratings received for each minicourse and make that number the score:

Minicourse	# of 5 ratings	Score
A. Assessing Organizational Training Needs		
B. Assessing Individual Training Needs		
C. Defining Training Outcomes		
D. Adult Education Theory and Techniques		
E. Training Group Discussion Leader		

6. Add score of each minicourse under 1-5 to get cumulative scores:

Minicourse	Score from 1	Score from 2	Score from 3	Score from 4	Score from 5	Total
A. Assessing Organizational Training Needs						
B. Assessing Individual Training Needs						
C. Defining Training Outcomes						
D. Adult Education Theory and Techniques						
E. Training Group Discussion Leader						

7. Select the minicourse with the highest score.

Session Assessment Form

In the space provided below, rank the five most important session topics in the order that represents your strongest training needs. (1 = strongest; 5 = weakest)

(A) Basic Assumptions—an understanding of the basic principles underlying adult learning (45 minutes)

(B) Goal Analysis—dealing with "fuzzies": know how to develop clear and adequate outcome statements (1 hour)

(C) Instructional Objectives—how to formulate specific learner outcome statements (1 hour)

(D) Adult Learning Theory—covers Malcolm Knowles' analysis of the four basic adult qualities that affect adult learning (1½ hours)

(E) Psychological Learning Climate—how to create a climate that enhances learning (40 minutes)

(F) Feedback I—ground rules for giving feedback in group learning situations (40 minutes)

(G) Feedback II—practice in applying feedback ground rules (1½ hours)

(H) Small Group Skills—how to analyze the dynamics of a group that is/is not working well (2½ hours)

(I) (Other session(s) trainer would like to adapt and run)

Letter	*Full Title of the Session*
1.	
2.	
3.	
4.	
5.	

(For Trainer's Use)

Tabulation of Session Assessment Forms

(for conducting individual sessions)

1. Count up the number of 1 ratings received for each session and multiply by 5 to get course score:

Session	# of 1 ratings		Score
A. Basic Assumptions		X 5	______
B. Goal Analysis		X 5	______
C. Instructional Objectives		X 5	______
D. Adult Learning Theory		X 5	______
E. Psychological Learning Climate		X 5	______
F. Feedback I		X 5	______
G. Feedback II		X 5	______
H. Small Group Skills		X 5	______
I. Other Session(s)		X 5	______

2. Count up the number of 2 ratings received for each session and multiply by 4 to get score:

Session	# of 2 ratings		Score
A. Basic Assumptions		X 4	______
B. Goal Analysis		X 4	______
C. Instructional Objectives		X 4	______
D. Adult Learning Theory		X 4	______
E. Psychological Learning Climate		X 4	______
F. Feedback I		X 4	______
G. Feedback II		X 4	______
H. Small Group Skills		X 4	______
I. Other Session(s)		X 4	______

3. Count up the number of 3 ratings received for each session and multiply by 3 to get score:

Session	# of 3 ratings		Score
A. Basic Assumptions		X 3	______
B. Goal Analysis		X 3	______
C. Instructional Objectives		X 3	______
D. Adult Learning Theory		X 3	______
E. Psychological Learning Climate		X 3	______
F. Feedback I		X 3	______
G. Feedback II		X 3	______
H. Small Group Skills		X 3	______
I. Other Session(s)		X 3	______

4. Count up the number of 4 ratings received for each session and multiply by 2 to get score:

Session	# of 4 ratings		Score
A. Basic Assumptions		X 2	______
B. Goal Analysis		X 2	______
C. Instructional Objectives		X 2	______
D. Adult Learning Theory		X 2	______
E. Psychological Learning Climate		X 2	______
F. Feedback I		X 2	______
G. Feedback II		X 2	______
H. Small Group Skills		X 2	______
I. Other Session(s)		X 2	______

5. Count up the number of 5 ratings received for each session and make that number the score:

Session	# of 5 ratings	Score
A. Basic Assumptions		______
B. Goal Analysis		______
C. Instructional Objectives		______
D. Adult Learning Theory		______
E. Psychological Learning Climate		______
F. Feedback I		______
G. Feedback II		______
H. Small Group Skills		______
I. Other Session(s)		______

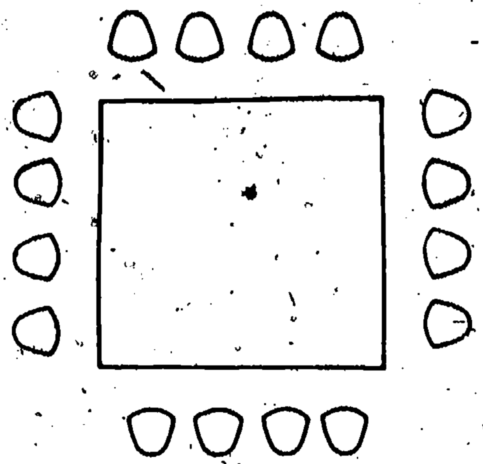
6. Add score of each minicourse under 1-5 to get cumulative scores:

Minicourse	Score from 1	Score from 2	Score from 3	Score from 4	Score from 5	Total
A. Basic Assumptions						
B. Goal Analysis						
C. Instructional Objectives						
D. Adult Learning Climate						
E. Psychological Learning Climate						
F. Feedback I						
G. Feedback II						
H. Small Group Skills						
I. Other Session(s)						

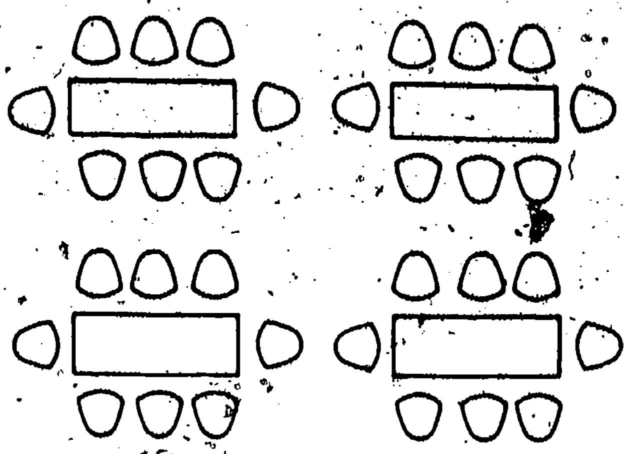
7. Select the session(s) with the highest score.

ILLUSTRATIONS OF VARIOUS MEETING ARRANGEMENTS

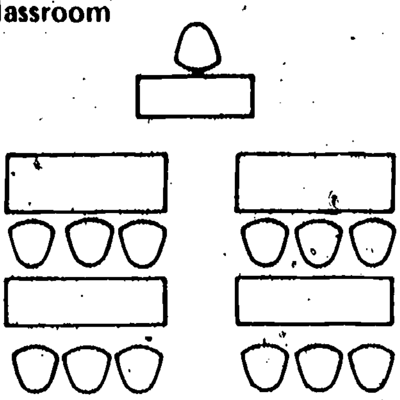
1. Round Table Discussion



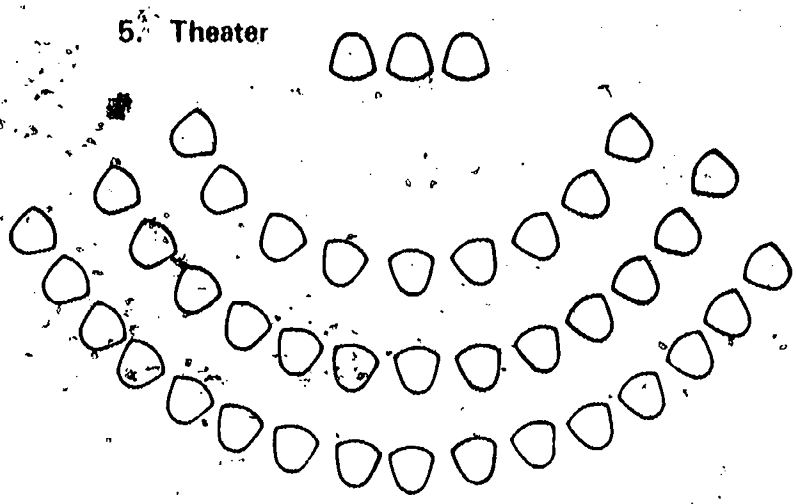
4. Workshop



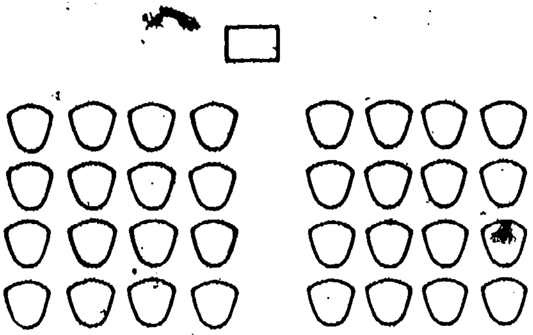
2. Classroom



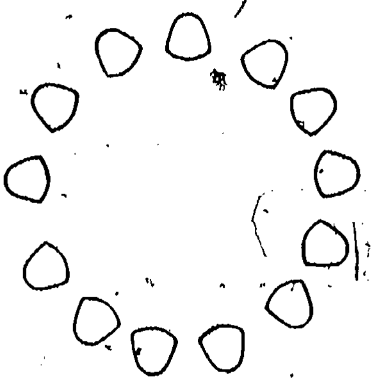
5. Theater



3. Auditorium



6. Informal Discussion



SYMBOLS: Chair Desk or Table Podium

Sample Presentation Cue Cards

(actual size 5 x 8)

media materials equipment	Session 11	Title: Training Group Analysis

A. Opening remarks (2 minutes)

- Purpose—to provide criteria for determining composition of training groups

B. Lecture and discussion (10 minutes)

Reference 1 (for flip chart 1)

- Selection can be based on common need—most usual.
- Selection may be based on shared or mixed characteristics, which has both advantages and disadvantages.

Reference 2

- Teaching points — mixed age group—exposure to breadth of experiences vs. possible role conflict;
  - mixed sociocultural group—opportunity for mutual understanding vs. communication difficulties; and
  - mixed training/education experience—opportunity for peer teaching vs. adverse effect of oversimplification on sophisticated participants.
- Learners must all be ready and willing to learn.
- All learners should have similar time and resources available.

media materials equipment	Session 11	Title: Training Group Analysis

C. Small group task – training group composition (30 minutes)

- Purpose—to identify specific criteria for building a trainee group for one of the jobs described.
- Refer participants to pages 9-15 of TEPG.

Handout 1

- Read handout.
- Make sure all three job descriptions are worked on.
- Select a reporter for each group.

D. Large group discussion – report on task (15 minutes)

- Ask group reporters for criteria identified by each group
- Invite discussion following each presentation

E. Closing remarks (2 minutes)

- Review criteria – common need,
  - shared or mixed characteristics,
  - learner attitude, and
  - time and resource constraints.
- These criteria are to be used in following work session.

Training Alcoholism Trainers
Participant Pre/Post Cognitive Test

(to be administered at the beginning and end of course)

Participant's Name ________________ Date ________________

1. The most effective way to select the members of a training group is to: (circle one)
   (a) Accept everyone who expresses interest in attending.
   (b) Accept those with similar job functions and level of responsibility.
   (c) Accept those with similar backgrounds of education, experience, and points of view.
2. Training solutions are most successful in cases where performance problems are caused by: (circle one)
   (a) Environment—external forces.
   (b) Motivation/attitude—internal forces.
   (c) Lack of skill knowledge.
   (d) Equally successful for all of the above.
3. Which of the following are concerns of the Trainer (T) and which are outside of his or her concern and should therefore be handled by someone other than the trainer (O)? Please place a T (Trainer) or O (Other Person) in the blank provided.

   ______ (a) Identification of proper training group

   ______ (b) Temperature of meeting room

   ______ (c) Curriculum development

   ______ (d) Determination of organizational goals

   ______ (e) Building in mechanisms for trainee feedback and evaluation

   ______ (f) Availability of pens, paper, etc.

   ______ (g) Degree of psychological comfort of trainees in the training situation

   ______ (h) Selection of prospective trainees and description of selected group

   ______ (i) Arrangement of meeting room chairs and tables
4. Throughout the course of planning for a training event, you may have to obtain information from various sources. An interview is one technique. What are two disadvantages of an interview?

From the following list, choose the correct answer to each of the following three questions. Write the word in the proper blank.

Lecture Method
Demonstration
Survey
Persuasive Method
Role Play

5. If the volume of information to be covered in a training session is sizable, the training group numbers 25, and the instructor is very knowledgeable, what method of delivery would be preferable?

____

6. If the information to be covered is emotionally charged yet clearly defined, the trainee group numbers 12, the trainees are comfortable with each other and the trainer, and the trainer feels that these trainees learn best through observation and feedback, what method of delivery would be preferable?

____

7. If a training session is to be designed with the purpose of explaining to a three-member counseling staff the proper procedure for recordkeeping as required by new Federal legislation, what method of delivery would be preferable?

____

8. Trainers of adults should be able to write clear learning goals when preparing a training plan. Circle the clearest of the following goals:

(a) Student nurses in this course will learn how to care for alcoholic patients in withdrawal.

(b) Student nurses in this course will understand the symptoms of impending DT's.

(c) At the completion of this session, student nurses will be able to state three symptoms of impending DT's, and three recommended things to be done for the patient.

9. List three characteristics of learning activities appropriate for use with adult training groups. Learning activities should be:

(1)

(2)

(3)

10. List three things to look for in observing groups that would assist in assessing the group.

(1)

(2)

(3)

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11. At times, task and/or climate intervention by the trainer may be indicated. Which of the following are most appropriately defined as Task Interventions (T) and which as Climate Interventions (C). Please place a "T" (Task Interventions) or a "C" (Climate Interventions) in the blank.

_____ (a) Humor, aimed at easing tension, anxiety.

_____ (b) Offer an analysis, summary, and/or clarification of material that has been covered so far.

_____ (c) Identify resources that might be useful.

_____ (d) Show empathy for the verbal or nonverbal affect in a group.

_____ (e) Diagram or write out what has been spoken, to provide clarity and/or focus.

_____ (f) Confront. Give data to back up any confrontation.

12. Circle any applicable response. An instructional objective functions as a tool:

(a) to determine feasibility
(b) to fix accountability
(c) to guide proper planning
(d) to insure clear communication
(e) to evaluate performance

13. List three of the decisions that have to be made in the *construction* of a questionnaire.

(1)

(2)

(3)

14. The process of comparing observed job behaviors to stated behavior objectives for the job is called: (circle one).

(a) Goal Analysis
(b) Job Analysis
(c) Performance Analysis
(d) Functional Analysis

15. Learning goal statements must be measurable to be evaluated. The best example of such a measurable goal statement is: (circle one)

(a) At the end of the training session, participants will understand three training issues.
(b) At the end of the course, participants will have defined a training group in their agency, and will write an inservice training plan for the next 6 months.
(c) At the completion of the course, social workers will be aware of the referral sources for alcoholics in their community.

16. Is it necessary for instructional objectives to spell out BOTH (1) desired behavior to be demonstrated by the learner and (2) specific standard of acceptable performance?

☐ Yes ☐ No

If yes, state why both elements are essential in three to four sentences.

If no, state whether only (1) or (2) is essential and why in three to four sentences.

17. Match the following words in section A with the proper definition in section B. Place the number of the word from section A on the blank in section B.

SECTION A

(1) Needs Assessment
(2) Goal
(3) Curriculum
(4) Method
(5) Simulation
(6) Media
(7) Goal Analysis
(8) Job Analysis
(9) Performance Analysis
(10) Climate Setting
(11) Openness Continuum

SECTION B

_____ A basic approach to instruction. For example, lecture, site visit, small group discussion.

_____ The process of describing a job slot and its function independent of the incumbent worker.

_____ Activities conducted to determine if training is needed, as well as for whom, what kind, how much, etc.

_____ A tool for assessing the learning climate of a group.

_____ A training activity that is contrived to be like a real situation.

_____ A statement of purpose or intent.

_____ The total instructional plan for a given unit. It identifies learning objectives, training content and methods, and evaluation techniques.

_____ Any and all physical means used for communication between a message sender and a message receiver.

18. Listed below are seven major events in the development of training. For each of these we would like you to respond to two questions:

(a) How well does your training organization perform each event?

(b) How well do *you* perform each event?

		Organization	Yourself
(1)	Assessment of Training Needs	EX VG G F P VP*	EX VG G F P VP*
(2)	Setting of Training Goals and Objectives	EX VG G F P VP	EX VG G F P VP
(3)	Development of Curricula	EX VG G F P VP	EX VG G F P VP
(4)	Selection of Training Methods and Materials	EX VG G F P VP	EX VG G F P VP
(5)	Procurement of Training Resources	EX VG G F P VP	EX VG G F P VP
(6)	Conduct of Training Sessions	EX VG G F P VP	EX VG G F P VP
(7)	Evaluation of Training	EX VG G F P VP	EX VG G F P VP

*EX = Excellent
VG = Very Good
G = Good
F = Fair
P = Poor
VP = Very Poor

Training Alcoholism Trainers

Answer Key for

Participant Pre/Post Cognitive Test

		Source of Content
1.	b	Session 11, B.1
2.	c	Session 8, C.3
3.	a. T	TEPG
	b. T	Session 21, Handout 3
	c. T	TEPG
	d. T	TEPG
	e. T	TEPG
	f. T	Session 21, Handout 2
	g. T	Session 22, Handout 1
	h. T	TEPG
	i. T	Session 22, Handout 2
4.	(1) costly (2) subject to bias of interviewer	Session 10, Handout 3
5.	lecture method	Session 15, Handout 1
6.	role play	Session 15, Handout 3
7.	demonstration	Session 15, Handout 2
8.	c	Session 12
9.	self-directed problem-centered experience-based immediate in application	Session 13, p. 5
10.	content vs. process communication decisionmaking procedures individual, group, task needs	Session 25, Handout 1
11.	a. C	Session 25, Handout 4
	b. T	
	c. T	
	d. C	
	e. T	
	f. C	

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Answer Key (cont'd)

		Source of Content
12.	all	Check Mager for content
13.	form of response sequence of questions wording of questions content of questions	Section 9, Handout 1
14.	c	TEPG, p. 16
15.	b	Session 4
16.	Yes The desired behavior indicates what performance will be expected as evidence of learning. A standard of acceptable performance serves as a measure of how well, or to what extent, the objective was achieved.	Session 12
17.	4	Glossary
	8	TEPG
	1	Glossary
	11	Session 22, Handout 1
	5	Glossary
	2	Glossary
	3	Glossary
	6	Glossary

Participant Postsession Rating Form

(administered at end of each session)

Session Title ____________________ Date ____________________

Please circle the response which most accurately reflects your reaction to this session.

1. Relevance of session content to your needs:

Highly Relevant		Adequate		Very Irrelevant
1	2	3	4	5

2. Relevance of session methodology to your needs:

Highly Relevant		Adequate		Very Irrelevant
1	2	3	4	5

3. Relevance and usefulness of handouts (if applicable):

Highly Relevant		Adequate		Very Irrelevant
1	2	3	4	5

4. Degree to which you understood the objectives of the session:

Thoroughly Understood				Did Not Understand Them At All
1	2	3	4	5

5. Degree to which objectives of the session were achieved:

Completely Achieved				Not Achieved At All
1	2	3	4	5

6. Degree of your interest in the session:

Excellent				Poor
1	2	3	4	5

7. Applicability of session content to your job duties and responsibilities:

Highly Relevant				Very Irrelevant
1	2	3	4	5

8. Effectiveness of facilitator presentation:

Extremely Effective				Extremely Ineffective
1	2	3	4	5

9. Please offer any general comments or suggestions for improvement of the session.

Debriefing Guidelines

These questions are designed to elicit verbal reactions from participants after the training program is concluded. The resulting information will complement the data collected on session rating forms (if used) and the final reaction form.

1. What specific topics or sessions did you like? Dislike? For what reasons?

2. How can specific topics or sessions be improved?

3. Which methods are most effective? Ineffective?

4. How can the instructor's role be improved?

5. In general, will the content covered be useful to you on your job? If not, why not?

6. Were the day's activities in keeping with the session goals and objectives? Were the objectives achieved?

7. What other general comments or recommendations do you have?

Date ______________

Participant Final Evaluative Review

(to be administered at end of last session)

1. Looking back over the entire course, please rate the following aspects of your overall reaction to it:

   a. Relevance of seminar content to your needs:

Very Relevant		Fairly Relevant		Not Relevant
1	2	3	4	5

   b. "Mix" of intellectual materials with examples or applications:

Very Good Mix		Fair Mix		Poor Mix
1	2	3	4	5

   c. Trainer/team performance (i.e., clarity, unity, cooperation):

Very Good		Fair		Poor
1	2	3	4	5

   d. Course environment (site, accessibility, materials, arrangements, etc.):

Very Appropriate		Appropriate		Not Appropriate
1	2	3	4	5

   e. Opportunity to inform course staff and other participants of your changing needs, views, etc.:

Ample Opportunity To Be Heard		Some Opportunity		Little or No Opportunity To Express Myself
1	2	3	4	5

   f. Delivery of new information:

All New Information		Some New Information		No New Information
1	2	3	4	5

   g. Please rate the course as a whole:

Very Good		Fair		Poor
1	2	3	4	5

2. During the course, what presentation or activity was *most* rewarding to you?

____

Why? ______________________________

____

3. During the course, what presentation or activity was *least* rewarding to you?

____

Why? ______________________________

____

4. How valuable were the handout materials and readings?

Most Valuable		Fairly Valuable		Not Valuable
1	2	3	4	5

5. How would you rate the seminar as a whole in relation to:

a. Clarity with which goals and objectives were stated:

Very Clear		Clear		Not Clear
1	2	3	4	5

b. Achievement of stated goals and objectives:

High Achievement		Moderate Achievement		Low Achievement
1	2	3	4	5

6. List any unanticipated benefits you received from attending this program:

____

____

____

____

____

7. Please add any other comments or reactions below relating to any aspect of the training that had an impact on you and that we have not covered in the previous questions (hotel accommodations, meals, support staff, sequence of events, workload, library, etc.):

____

____

____

____

____

____

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METHODOLOGY: The course is presented in a small group format with 10-20 participants.

The course has very little lecture. It relies heavily on experiential activities, workshops, discussions, role plays, etc.

The participants will be called upon to draw from and share their past work experiences in order to solve problems with which they are confronted during training. In short, the course is designed to present new information and develop new skills in the context of participant's past experience.

FACILITIES, MATERIALS, & EQUIPMENT NEEDED:

- A meeting room to accommodate 16-20 participants (with space for small group work, either in same room or in breakout rooms)
- Three resource booklets for facilitator's use in preparation (see list on page 188)
- Flip chart
- Video tape equipment (optional)
- Duplicating facilities for running off assessment and evaluation instruments

TIME: Depending upon the needs, interest, and time of the group to be trained, single sessions or a combination of sessions may be used. Total program length is 40 hours = 26 sessions which run from 40 minutes to 2½ hours each.

An assessment process is described in section IV of the *Trainer Manual* to assist trainers in tailoring the training offered to the needs and time constraints of their own target group.

"END OF DOCUMENT"