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ABSTRACT

This workbook is to be used in conjunction with the Trainer Manual entitled Training Alcoholism Trainers. The program was developed to upgrade training design and delivery skills of inservice trainers in the field of alcoholism. The workbook contains all the handout sheets necessary for participant sessions. (Author/BMW)

Participant Workbook

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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Introduction

This workbook is to be used in conjunction with the Trainer Manual of NCAE's program, Training Alcoholism Trainers. The workbook contains all of the handouts participants will need for the sessions. A session-by-session guide for conducting the training program is in section III of the trainer manual.

Contents

Glossary

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 motivation 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 this 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 (instructor). 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.

Instruction. A series of events that manipulate the learner's environment to assist him or her in changing his or her behavior to meet specified learning objectives. Instruction is a presenting activity, as contrasted with learning, which is a receiving/responding activity.

Learning Activity. The actual learning experience to which a learner is exposed during units of instruction.

Needs Assessment. Activities conducted to determine *If* training is needed, as well as for whom, what kind, how much, etc.

Goal. A statement of purpose or intent.

Objective. A statement of learning outcome in terms which specify an observable behavior, an accepted standard of achievement, and the conditions under which the behavior is to take place.

Mastery. A demonstration of behavior by the learner which shows that a prespecified level of learning has occurred.

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

Training Package. The training design plus all materials required to implement that design. (When the training package is totally individualized, it can be called a learning package.)

Method. A basic approach to instruction. (For example: lecture, site visit, programed instruction, and small-group discussion.)

Media. Any and all physical means (including speech or print) used for communication between a message sender and a message receiver.

Simulation. A training activity that is contrived to be like a real situation. (For example: role play, training games, etc.)

Group. Two or more persons who share the following characteristics:

- They think of themselves as a group with an identifiable membership.
- They share a common purpose.
- They work in a trusting climate where each member's contributions are valued.
- They pay attention to how they work together.
- They can, when they choose to, act together as a single entity.

Group Process. The complex forces which cause persons in a group to behave the way they do. Group process is concerned with what happens in groups, given certain conditions and certain human behaviors; it is *not* concerned with moral issues of how people ought to behave.

Intervention. An interruption of an ongoing activity that influences the direction, content, behavior, or affect in a group.

Basic Assumptions

1. Assumptions about the present state of training in the alcoholism treatment and prevention field:
   a. Most trainers held treatment or prevention jobs before they were assigned to a training job and because of this tend to cluster their training programs around skills which they have practiced or know best.
   b. Few trainers in alcoholism have had an opportunity to learn formally adult education theory and methods.
   c. Basic training in design and delivery skills for those with training responsibilities will have a payoff in the increase of quality care.
   d. The same design process used to plan an inservice job training program can also be applied to other education needs of direct service agencies such as community education, organization development, staff development, outreach, etc.

2. Assumptions about education and learning:
   a. Education is a series of structured learning activities designed to occur within a specific time frame with the intention of effecting a change in the behavior of the participants.
   b. There is a clear distinction between instruction and learning. Learning is the goal, instruction is the means.
   c. The role of a trainer as facilitator of learning is distinct from the traditional concept of the teacher or instructor.
   d. Training is a learnable skill.

Discussion Task Instructions

(for flip chart 1)

1. Share with each other your experience of a concrete example of one or more of the assumptions in either of the two sets.
2. Select a spokesperson who will represent your group in a panel-discussion to follow.

Design Task Instructions

General Requirements:

Length: A single training event that includes at least 10 hours of learning activities.

Topic: Must be drawn from a real job training need (professional, clerical, skilled, or semiskilled) of a back-home agency.

Target Group: Must be one with which you have had firsthand experience and which will be willing to participate in the event.

Trainer: Must serve in an active leadership role as facilitator, even though "experts" may be introduced.

General Options:

Topic:
- May focus on total skills required for one specific job.
- May include several selected skills required for one specific job.
- May focus on a single skill required in several job areas.
- May include several selected skills required for several job areas.

Data:
- May be drawn from training plan or agency grant application or other records.
- May be collected by telephone (at participant's expense).
- May be conjecture, if so identified (an educated guess).

Your completed task (10-hour training event) must include the following:

1. A statement of goals and objectives (learning outcomes) for the training event.
2. Provision for a three-stage needs assessment process, covering:
   - organization needs analysis,
   - job and performance analysis, and
   - training group analysis.
3. A description of the training group.
4. A general outline of content sequence with headings and large time-block schedule for total event.
5. A detailed outline (minute-by-minute script) for at least one learning activity (1 to 2 hours).
6. An evaluation and feedback plan.

Note: Each of the above six requirements will be met by filling out a Training Event Planning Guide.

Training Event Planning Guide

The Training Event Planning Guide is designed as a disposable workbook to be used in preparing a training program in job skills. The TEPG outlines page by page a series of consecutive steps in a comprehensive planning process that might not be necessary in its entirety for every training event. For specific events, therefore, not every page will necessarily be applicable.

The workbook may be used in two ways:

1. It may be used by organization planners on a regular basis as part of the planning process to identify the training needs of an organization.
2. A trainer can use the guide after a training assignment is given him or her. The guide lays out the steps to take after the boss has said: "Here is $500 to train outreach workers—go to it."

(The purpose of including the TEPG in the training practitioners' clinic is to give the participants practice in following a step-by-step sequence in producing a written design for a training event which, by definition, is usually a series of several related learning activities.)

The major design categories are:

I. Needs Assessment (pp. 4-19)
   - Organization Goal Analysis
   - Job and Performance Analysis
   - Training Group Analysis

II. Curriculum Building (pp. 20-27)
   - Writing Learning Outcomes
   - Constructing Learning Activities
   - Selecting Evaluation Strategy

The major steps in the sequence are:

1. Determine goals of the organization in which training will occur.
2. Analyze the means which the organization has chosen to achieve its goals.
3. Determine the effectiveness of each job in fulfilling its purpose as a means to achieving a goal.
4. Determine management's purpose in selecting a specific job for training.

5. Determine the tasks and level of performance required by each specific job.
6. Determine the performance level of each worker in each specific job.
7. Specify "training-needed" areas (knowledge, skills, attitudes) for each specific job.
8. Determine each worker's readiness to learn the "training-needed" areas.
9. Select training topics and training groups by identifying areas of common learning needs.
10. Determine learning outcomes by writing goals and objectives, both broad and specific, for each training topic.
11. Select and construct learning activities.
12. Determine evaluation goals and identify feedback mechanisms. (Necessary evaluation data will be found on pp. 8, 9, 10, 11, 12, 24, 25, and 33).

Necessary Evaluation Data

Key Questions

- What is the purpose of the organization (agency, company, etc.)?
- What is the agency organized to do?
- How and when will the agency know when it has achieved its goals?
- What tasks or jobs are required to achieve the goals?
- Who will be responsible for managing the tasks required to meet the goals?

Organization Goal Analysis

The goals of the organization in which the training event will take place are as follows:

Rationale: Some organizational needs will not be met by training solutions. Determination of training need can only follow identification of training as a solution to a larger organizational need. This larger need can only surface in an organizational goal analysis procedure. This step is usually considered to be the sole function of management. However, the trainer needs this information and the payoff of a more relevant curriculum is worth the risk of asking management to undertake a needs analysis.

Key Questions

- Can the agency's services be considered its means to the end (goals)?
- Is the target job* (skill) one of these means?
- Is the target job effective?
- What other means (jobs, services) are there?
- How does the organization know that it has chosen the right means?

Organization Goal Analysis (continued)

An analysis of the means which the organization has chosen to achieve its goals:

Rationale: This analysis helps to relate the need for training in this job (target job) to other training needs that the agency may have.

*The target job may be the job for which you have been assigned to develop a training program.

Necessary Evaluation Data

Key Questions

- How much does it pay?
- Private office?
- Special fringes?
- How long do workers stay in the job?
- Ever the first to be affected by budget cuts?
- Is it supervised?
- How is it evaluated?
- Could the organization do without it?

Organization Goal Analysis (continued)

The following is an evaluation of how vital the organization believes the target job (skill) is in fulfilling its goals:

Rationale: Agency goals affect the nature, priority, and salary level of a job. These goals also affect the support services to the job, the supervision of the job, etc. Priority of training need will affect the program's design, location, and followup.

Necessary Evaluation Data

Key Questions

- Where did the order to train originate?
- Who requested it?
- Did it result from the yearly evaluation?
- Was a total-agency training needs assessment conducted?
- Is it really needed, or was money merely available?

Organization Goal Analysis (continued)

Management's purpose in selecting the target job (skill) for training is as follows:

Rationale: This factor will influence the sense of immediacy for the event in the eyes of the trainees. Their readiness to learn may correspond to this factor.

Necessary Evaluation Data

Key Questions

- What tasks ought to be done?
- What tasks does the tradition of the organization require?
- What is the proper sequence?
- What tasks does the profession usually expect?
- What is a minimum example of competency?
- What would a maximum example be?

Job Analysis

The following list of behavioral tasks is necessary for the target job (skill) to fulfill its functio

Rationale: A measure, criterion, or standard for a job must be determined before a person's performance can be evaluated and training need identified. Job analysis is a process of determining needed job function and competency level independent of the incumbent worker.

Key Questions

- Whose performance will be analyzed?
- What level of *knowledge* am I looking for?
- What level and types of *skills* am I looking for?

Performance Analysis

The following plan is designed to assist the trainer in identifying deficiencies in knowledge or skills on the part of the workers in the target job (skill):

1. Name, location, job title of each worker in target job (skill):

2. The following behaviors and knowledge will be analyzed:

Rationale: The purpose of the performance analysis process is the identification of performance deficiencies in skills and knowledge.

Performance Analysis (continued)

Key Questions

- When will each person be available?
- Where will the visit be?
- How long for each interview?
- How can the worker be put at ease?
- What are the *goals* for each interview?
- What is the sequence of questions to be asked?

3. Interview schedule for examining each worker.

4. Sample interview questions are as follows:

Rationale: Observation, evaluation, and questioning about weaknesses is unpleasant and needs planning and forethought to yield valid data.

Performance Analysis (continued)

5. The following questionnaires (attach if prepared as separate instruments) will be used in analyzing the performance level of each of the workers in the target job (skill):

Key Questions

- Is each question necessary?
- Does it cover the content?
- Is it easy to understand?
- Are all the questions in a logical sequence?
- Is each question in an easily answered form?

Rationale: Questionnaires should yield data that are easily summarized and reported. Good questions are not ad libbed!

Key Questions

- How does the observed performance of each task *compare* to what is required?
- What knowledge is lacking?
- What attitudes are lacking?
- What skills are lacking?
- Can training solve all the problems identified?

Performance Analysis (continued)

6. After comparing the interview and questionnaire data to the job analysis data, the following performance deficiencies have been identified:

   A. Worker and skill, knowledge, or attitude lacking:

   B. Worker and skill, knowledge, or attitude lacking:

   C. Worker and skill, knowledge, or attitude lacking:

   D. Worker and skill, knowledge, or attitude lacking:

   E. Worker and skill, knowledge, or attitude lacking:

(continue if necessary on supplementary page)

Rationale: Performance analysis is a process of comparing observed job behaviors with stated behavioral objectives for the job.

Training Group Analysis

Key Questions

- What deficiency areas are shared by enough people to warrant a training event?
- Are there any knowledge deficiencies in common?
- Are there any skills lacking in the total group?
- Is the whole group lacking in any basic attitudes necessary to do their jobs well?

The following list of "training-needed" areas is shared by each worker in the target job (skill):

1. Common knowledge needs:

2. Common attitude needs:

3. Common skill needs:

(continue if necessary on supplementary page)

Rationale: Selection of training group should be determined primarily by the common need of the learners.

Key Questions

- How many varieties of knowledge deficiencies have emerged?
- Can these workers be sent elsewhere to be trained in this isolated deficiency?
- Is there a sufficient variety of attitude deficiencies to warrant a special training focus on attitudes alone?

Training Group Analysis (continued)

The following "training-needed" areas are common to small groups of several workers but not the total group of workers in the target job (skill):

1. Common need (knowledge, skill, attitude):

2. Names, location, title of workers:

1. Common need (knowledge, skill, attitude):

2. Names, location, title of workers:

(continue if necessary on supplementary page)

Rationale: Identification of training groups should be determined primarily by the common need of the learners.

Key Questions

- How many persons carry the same characteristic?
- How much aware of the characteristic are they?
- Do they think of themselves as a group?
- Should training groups be assembled on the basis of one or several of these characteristics?

Training Group Analysis (continued)

Viewing the workers in the target job (skill) group as a whole, the following group characteristics can be described:

1. Personal (age, sex, race, language, etc.):

2. Salary level and responsibility:

3. Location of work place:

Rationale: There are advantages and disadvantages to various mixes of trainees. Some factors in selection are common interest of the learners, heterogeneous or homogeneous mix of personal resources and traits, ratio of number of trainees to trainer, time, location, and financial resources.

Training Group Analysis (continued)

4. Time available for training:

5. Experience level in career field:

6. Other social, cultural, personal characteristics:

Key Questions

- Is the worker teachable at this moment?
- Is the worker interested in spending time to learn now?
- Is the boss requiring cooperation?
- Does the worker realize his knowledge, skill, deficiency?

Training Group Analysis (continued)

The following is a rating of each worker's readiness to learn the common need areas previously identified:

1. Name

Is aware of need	( ) Yes	( ) No
Expresses interest to learn	( ) Yes	( ) No
Can be motivated	( ) Yes	( ) No
Special effort required	( ) Yes	( ) No

2. Name

Is aware of need	( ) Yes	( ) No
Expresses interest to learn	( ) Yes	( ) No
Can be motivated	( ) Yes	( ) No
Special effort required	( ) Yes	( ) No

(continue if necessary on supplementary page)

Rationale: Much training will be wasted if the learner is not ready, willing, and able to learn.

Key Questions

- Can the trainees understand these?
- Could others outside the immediate agency apply these criteria?
- Are the criteria fair?

Training Group Selection

Based on a consideration of organization need, job need, worker deficiency need, and interest; also, based on a consideration of social, cultural, and personal factors; the following criteria (standards) for selection of individual trainees can be stated:

1st criterion:

2nd criterion:

3rd criterion:

4th criterion:

Rationale: Selection criteria should be based on:

- areas of common need of the learners;
- areas of common interest of the learners;
- advantages of heterogeneous mix of personal resources;
- advantages of homogeneous mix of personal resources; and
- time and resource constraints.

Training Group Selection (continued)

Based on an application of the selection criteria, the following persons are selected to participate in the 2-day training event:

1.

2.

3.

4.

5.

6.

7.

8.

9. etc.

CURRICULUM BUILDING:
Learning Outcomes

Necessary Evaluation Data

Key Questions

- What do I want them to know?
- What do I want them to do?
- What attitude changes do I want to bring about?
- What do I, as trainer, want to do in this program?
- Does each goal statement express some general measure of *how and when* I will know that the desired result has happened?

Goals for the 2-Day Training Event

The following goals are broad statements of what I want the trainees to know and be able to do when they have finished the program:

1. Goal:

2. Goal:

3. Goal:

4. Goal:

Rationale: "If you don't know where you are going, you won't know how to get there!"
Before a curriculum can be assembled, these need areas must be translated into statements of learning outcomes. When stated in broad terms they are called "goals"; when stated in specific terms they are called "objectives."

Necessary Evaluation Data

Key Questions

- What will convince me that the new skill has been learned?
- How can I measure it during the training program?
- Does each statement of objective describe a performance?
- Does each statement of objective describe the conditions under which the trainee will perform?
- Does each statement of objective describe a criterion or standard for evaluating the trainee's performance?

Goals for the 2–Day Training Event (continued)

The following objectives are specific and measurable statements of how and when the trainees will demonstrate that they have achieved the goals of the training program:

1. Objective:

2. Objective:

3. Objective:

4. Objective:

Rationale: "How will I know one when I see one?"
An objective is stated in terms of an observable behavior, an accepted standard of achievement, and the conditions under which the behavior is to take place.

CURRICULUM BUILDING:
Learning Activities

Key Questions

- What subjects are usually appropriate for achieving my knowledge goals?
- What subjects are most often included in courses which teach the skills I have identified?
- If I were to go to a library for background information, what subject headings would I look up?

Search for Content Resources

The following subject (content) categories are suggested by the goals and objectives of the program:

Rationale: This step will simplify the process of selecting expert resources and canned exercises, since available literature is usually indexed by subject rather than by behavior.

CURRICULUM BUILDING:
Learning Activities

Key Questions

- Will the exercise achieve the objective?
- Are the learners self-directed?
- Is the focus problem-centered?
- Are the tasks experience-based?
- Do the skills have immediacy of application?
- Is there adequate time for task completion?
- Are more breaks needed?
- Is the room large enough and well lighted?

New Designs for Learning Activities

Attached are sample copies of learning activity forms specifically designed to achieve the objectives as stated. Each design has accounted for the following components:

1. Goals and objectives of the session; i.e., both broad and specific statements of learning outcomes.
2. Length of time required for each activity.
3. Equipment needed for presentation.
4. Copies of all materials to be distributed.
5. Statement of primary methods to be used.
6. Description of room arrangements.
7. A clear statement of the purpose of the activity and its linkage with the previous activity.
8. An activity to test participants' understanding of the goal of the exercise.
9. An identification and justification of the expert resources for content input.
10. Comfortable variety of activities.
11. Summary of the major points of all lecture content.
12. Detailed list of newsprint illustrations.
13. Major discussion points desired to emerge from small group discussion or brainstorming.
14. Prepared statements for all group tasks.
15. A review activity in which trainer and learner pull together the central concepts so that the group has a sense and recognition that real learning has taken place.
16. Method of evaluating whether or not the goal was achieved.

Rationale: Selection and sequencing of specific learning activities must be determined by (a) their appropriateness to achieve stated objectives and (b) the following assumptions of adult learning theory:

- Planned learning activities for adults must provide for their unique physiological, psychological, cultural, and social characteristics.
- Adult learners learn best when their learning activities are self-directed, problem-centered, experience-based, and have immediacy of application.

SAMPLE SINGLE-SESSION DESIGN FORM

Date

Training Group

Title

Goal

Objectives

Total Time

Equipment

Handouts

Techniques

Seating Arrangements

Time	Sequence of Activities	Lecture Points on Discussion Questions	Handouts	Equipment

SAMPLE SINGLE-SESSION DESIGN FORM

CURRICULUM BUILDING:
Learning Activities

Key Questions

- Can this exercise be used as is or does it require adaptation?
- Can I facilitate this exercise or do I have to have someone else to do it?
- Does this exercise require the use of materials that are not available or too expensive?
- Would this exercise consume more time than it is worth?
- Would it spawn unwanted tangents?

Evaluation and Selection of Predesigned Exercises

Attached are any predesigned (canned or packaged) learning activities that have been selected to be used in the 2-day training event. Each has been chosen and evaluated according to the following factors:

( ) Is most appropriate to achieve objectives as stated.

( ) Accommodates adult learning characteristics; i.e., activity is self-directed, problem-centered, and experience-based and has immediacy of application.

( ) Its effectiveness can be measured.

Rationale: Selection and sequencing of specific learning activities should be determined by their appropriateness to achieve stated objectives and by the estimated ability of the trainees to benefit by them.

CURRICULUM BUILDING: FLOW

Key Questions

- What type of logical flow—topical, cause and effect, level of difficulty—would be best for the learners?
- What natural sequences are demanded by the subject matter?
- Does readiness to learn indicate a sequence?
- Does interest level?
- Does each exercise have clear linkage with the next?
- Does any activity presuppose knowledge or skills that have not been taught?

Sequencing of Learning Activities

The following sequential flow identifies all major learning exercises and their relationship to each other. They will be presented in this order during the 2-day training event. (List by title of activity only, or draw a diagram of the flow.)

Rationale: Both the trainer and the trainees will benefit by understanding the reasoning behind the schedule to be presented later. Any future changes in schedule can be more effectively negotiated if the sequential requirements of the curriculum are understood.

CURRICULUM BUILDING: FLOW

Key Questions

- What time does each session begin?
- Coffee breaks?
- Meal breaks?
- Free time?
- Is there sufficient time to move from room to room?
- Fatigue factor?
- Is there time to relax and assimilate?
- Is a getting-acquainted exercise needed?
- Final ceremony?

Schedule of Learning Activities

The following is an hour-by-hour schedule of the activities for the 2-day training event:

Rationale: A published schedule is a curriculum roadmap for the trainees, resource persons, trainer, and support staff.

CURRICULUM BUILDING: EVALUATION—FEEDBACK

Necessary Evaluation Data

Key Questions

- What information is wanted?
- Where in the sequence of activities is feedback necessary in order to be able to make adaptive decisions?

Evaluation Method

The following items are necessary to insure a flow of feedback about whether the objectives of the exercises are being met and whether the goals of the program will be achieved:

1. Statement of evaluation goals.

2. Learning activities that require special evaluation.

3. Evaluation instruments (attach a copy).

4. Specific feedback activities (list in sequence, giving the title of the learning activity and the feedback technique used).

5. The person who will monitor the training event will be (name ________________) and his or her role will be (role ________________).

6. The following activities will be needed to support the newly learned skills:

7. The following persons should receive a report on the results of the training event:

Rationale: Evaluation is not a final step in the sequence but a continuous process of feedback and review. This process matches results to stated goals and must be planned before each stage in the design process.

Design Task Stages

(for flip chart 1)

STAGE I: The Design Stage. Each trainee designs a complete learning activity.

STAGE II: Evaluation I. Trainees evaluate each other's Design Tasks.

STAGE III: Evaluation II. Group evaluation of good points of individual Design Tasks.

Goal Statements

Instructions: Place a checkmark in the appropriate blank for each statement.

1. Clients will use no alcohol in any form for a period of 6 months.

   ________ clear

   ________ unclear

   ________ not sure

2. Counseling staff will show an awareness of clients' potential for recovery.

   ________ clear

   ________ unclear

   ________ not sure

3. Counselors will defend the rights of clients at the local social service agency.

   ________ clear

   ________ unclear

   ________ not sure

4. Secretaries on duty during evening hours will identify clients who are in a crisis situation and refer them to a counselor within 3 minutes.

   ________ clear

   ________ unclear

   ________ not sure

5. Staff will make every effort to reach the black population in this community.

   ________ clear

   ________ unclear

   ________ not sure

6. The number of black clients in the program will be increased by 15 percent within the next fiscal year.

_______ clear

_______ unclear

_______ not sure

7. All members of the committee will agree on a means of providing detox services during this meeting.

_______ clear

_______ unclear

_______ not sure

8. A centralized data collection system for Smith County's mental health services will be operational by January 1, 1977.

_______ clear

_______ unclear

_______ not sure

9. Local judges will be convinced of the need for a DWI program.

_______ clear

_______ unclear

_______ not sure

10. The number of alcoholic admissions at Smith County General Hospital will increase by 10 percent during the next fiscal year.

_______ clear

_______ unclear

_______ not sure

11. Of the clergy who attend this workshop, 25 percent will make client referrals to this clinic within the next month.

_______ clear

_______ unclear

_______ not sure

12. Student nurses in this course will know how to care for alcoholic patients in withdrawal.

_______ clear

_______ unclear

_______ not sure

13. Local physicians will support the alcoholism clinic.

_______ clear

_______ unclear

_______ not sure

14. A written agreement on provision of family counseling services will be signed by a majority of this committee during this meeting.

_______ clear

_______ unclear

_______ not sure

15. The Smithtown Lions Club will pledge $500 to furnish the new halfway house by January 1, 1975.

_______ clear

_______ unclear

_______ not sure

16. The number of alcohol-related accidents in Smith County will be reduced.

_______ clear

_______ unclear

_______ not sure

17. Psychologists at the Mental Health Center will feel comfortable working with alcoholic clients.

_______ clear

_______ unclear

_______ not sure

18. People in the Spanish-speaking community will feel welcome and comfortable at the alcoholism clinic.

_______ clear

_______ unclear

_______ not sure

19. The number of community volunteers in the program will be increased by 75 percent this year.

_______ clear

_______ unclear

_______ not sure

20. Joint staffing sessions will be held weekly between Family Services and alcoholism clinic staff for the next calendar year.

_______ clear

_______ unclear

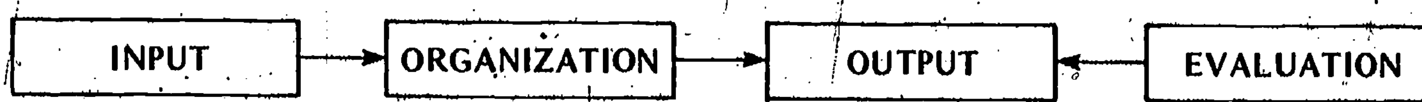
_______ not sure

Discussion Guide

1. What are some of the goals of your organization?
2. How do the goals and needs of your organization affect the ways in which specific jobs relate to one another?
3. How do organizational goals and needs affect the priority which these jobs are given in terms of material support, supervision, status, and salary?
4. How do organizational goals and needs affect the training outcomes of any program you design?

Organization Analysis

(for flip chart 1)



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Sample Job Description, Skill Areas, and Job Behaviors

Sample job description:

The individual serves as a member of a four-person team within the Experimental Education Laboratory. Each team—under the direction of a team leader—researches, develops, designs, delivers, and records training programs for practitioners in the field of alcohol abuse and alcoholism.

Skills needed to perform job:

1. Design needs assessment techniques and analyze results.
2. Develop learning outcomes (goals and objectives) stated in behavioral terms.
3. Select methods and strategies appropriate for goals.
4. Perform a range of adult education methodologies.
5. Record curriculum design in format usable by others.
6. Familiarity with literature in field of adult education and curriculum development.
7. Function as a team member.

Job behaviors (tasks) required by a single skill area:

Skill area: Record curriculum design in format usable by others.

Behaviors:

1. Writes clearly stated goals and objectives for session.
2. Knows and can state the purpose of the session, its linkage with previous and following session, and the principal learning points of the session.
3. Designs exercises which give a balance between cognitive and affective learning and writes clear instructions for their implementation.
4. Records each learning point in proper sequence.

Self-Assessment Guide

Organization Need Assessment (pages 8-11 of TEPG)

Weak			Strong
1	2	3	4

Job and Performance Analysis (pages 12-16 of TEPG)

Weak			Strong
1	2	3	4

Training Group Analysis (pages 17-23 of TEPG)

Weak			Strong
1	2	3	4

Writing Learning Outcomes (pages 24-25 of TEPG)

Weak			Strong
1	2	3	4

Curriculum Building (pages 26-32 of TEPG)

Weak			Strong
1	2	3	4

Evaluation and Feedback (page 33 of TEPG)

Weak			Strong
1	2	3	4

Self-Assessment Task Instructions

(for flip chart 1)

Assess your own strengths and weaknesses in each of the six areas and share with your colleagues your self-ratings and the reasons for them.

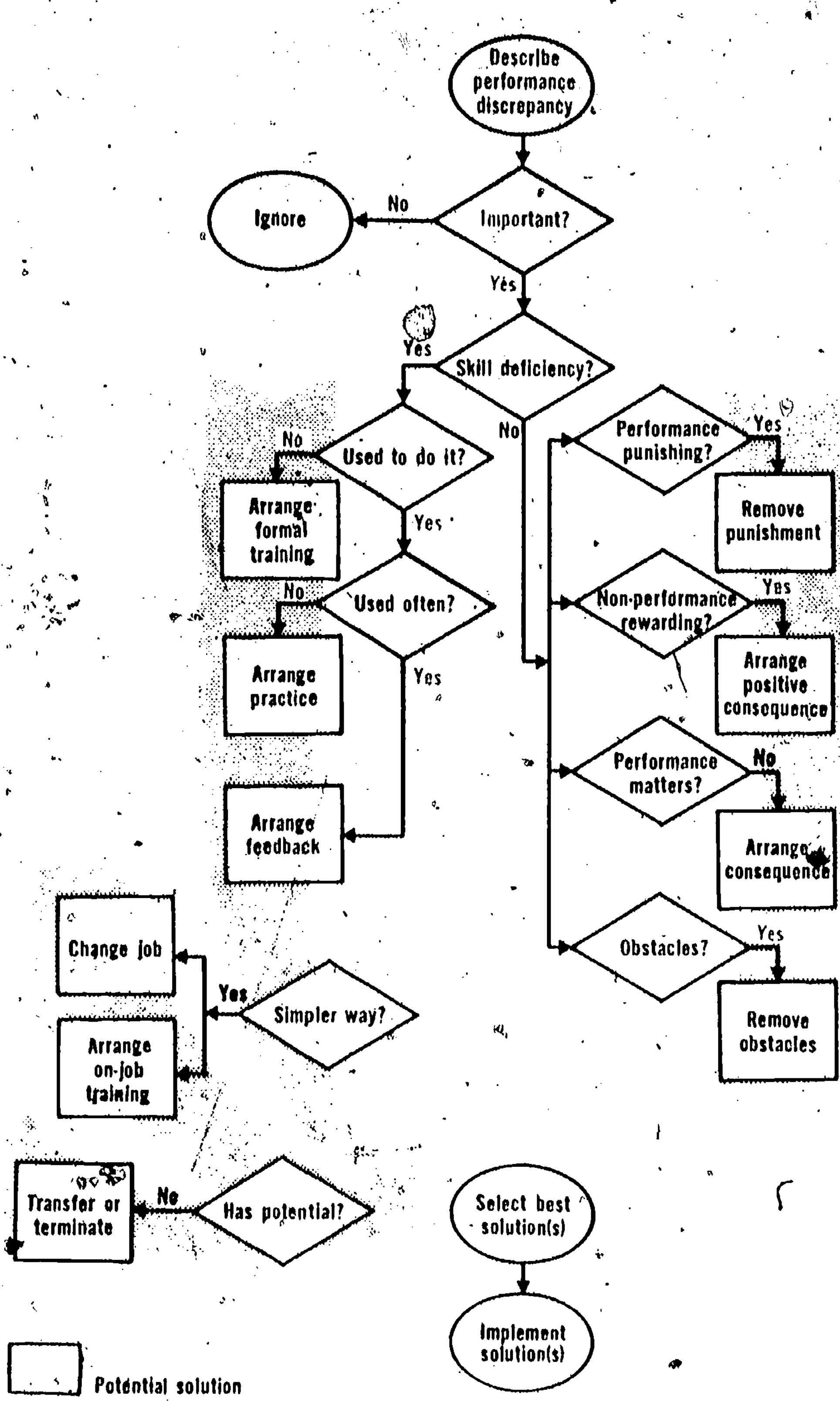
Formation of Resource Groups

(for flip chart 2)

Choose resource groups by the beginning of the next session. Talk with each other and form groups of three or four persons.

It will be to your advantage to have a balance of strengths in the six areas.

Flow Chart



Source: Mager, R.F. and Pipe, P. *Analyzing Performance Problems* (Belmont, Calif.: Fearon Publishers, Inc., 1972), p. 3.

Quick Reference Checklist

Key Issues	Questions to Ask
I. He isn't doing what he should be doing. *I think I've got a training problem.*	
1. What is the performance discrepancy?	Why do I think there is a training problem? What is the difference between what is being done and what is supposed to be done? What is the event that causes me to say that things aren't right? Why am I dissatisfied?
2. Is it important?	*Why* is the discrepancy important? What would happen if I left the discrepancy alone? Could doing something to resolve the discrepancy have any worthwhile result?
3. Is it a skill deficiency?	Could he do it if he really had to? Could he do it if his life depended on it? Are his present skills adequate for the desired performance?
II. Yes. It is a skill deficiency. *He couldn't do it if his life depended on it.*	
4. Could he do it in the past?	Did he once know how to perform as desired? Has he forgotten how to do what I want him to do?
5. Is the skill used often?	How often is the skill or performance used? Does he get regular feedback about how well he performs? Exactly how does he find out how well he is doing?

Source: Mager, R. F. and Pipe, P. *Analyzing Performance Problems* (Belmont, Calif: Fearon Publishers, Inc., 1972), pp. 101-105.

Quick Reference List (continued)

Key Issues	Questions to Ask
6. Is there a simpler solution?	Can I change the job by providing some kind of job aid? Can I store the needed information some way (written instructions, checklists) other than in someone's head? Can I show rather than train? Would informal (i.e., on-the-job) training be sufficient?
7. Does he have what it takes?	Could he learn the job? Does he have the physical and mental potential to perform as desired? Is he overqualified for the job?
III. It is not a skill deficiency. *He could do it if he wanted to.*	
8. Is desired performance punishing?	What *is* the consequence of performing as desired? Is it punishing to perform as expected? Does *he* perceive desired performance as being geared to penalties? Would his world become a litter dimmer (to him) if he performed as desired?
9. Is *non*performance rewarding?	What is the result of doing it his way instead of my way? What does he get out of his present performance in the way of reward, prestige, status, jollies? Does he get more attention for *mis*behaving than for behaving? What event in the world *supports* (rewards) his present way of doing things? (Are you inadvertently rewarding irrelevant behavior while overlooking the crucial behaviors?) Is he "mentally inadequate," so that the less he does the less he has to worry about? Is he physically inadequate, so that he gets less tired if he does less?
10. Does performing really matter?	Does performing as desired matter to the performer? Is there a favorable outcome for performing? Is there an undesirable outcome for *not* performing?

Quick Reference List (continued)

Key Issues	Questions to Ask
	Is there a sense of satisfaction for performing?
	Is he able to take pride in his performance, as an individual or as a member of a group?
	Does he get satisfaction of *his* needs from the job?
11. Are there obstacles to performing?	What prevents him from performing?
	Does he know *what* is expected of him?
	Does he know *when* to do what is expected of him?
	Are there conflicting demands on his time?
	Does he lack the authority? . . .the time? . . .the tools?
	Is he restricted by policies or by a "right way of doing it" or "way we've always done it" that ought to be changed?
	Can I reduce interference by improving lighting? . . .changing colors? . . .increasing comfort? . . .modifying the work position? . . .reducing visual or auditory distractions?
	Can I reduce "competition from the job"—phone calls, "brush fires," demands of less importance but more immediate problems?
IV. What should I do now?	
12. Which solution is best?	Are any solutions inappropriate or impossible to implement?
	Are any solutions plainly beyond our resources?
	What would it "cost" to go ahead with the solution?
	What would be the added "value" if I did?
	Is it worth doing?
	Which remedy is likely to give us the most result for the least effort?
	Which are we best equipped to try?
	Which remedy interests us most? (Or, on the other side of the coin, which remedy is most visible to those who must be pleased?)

Steps in Performance Analysis

(for flipchart 1)

1. Identify workers whose performance will be analyzed.
2. Identify behavior and knowledge that will be analyzed.
3. Design method to collect necessary data and collect that data.
4. Analyze data and identify nature of problem.

Problem Factors

(for flipchart 2)

Knowledge/Skill Discrepancy
Environment
Motivation/Attitude

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Guide to the Construction of Questionnaires

Decisions about Form of Response to a Question

1. Can the question best be asked in a form calling for check answer (or short answer of a word or two, a number, or a letter), free answer, or check answer with followup free answer?

   Best results are often achieved by means of a combination of free-answer and check-answer methods, or by compromises between them. Thus, single questions may consist of an initial check-answer part immediately followed by free-answer parts which inquire into the meaning of the check response and obtain examples, statements of the respondent's assumptions, the strength of his or her feelings on the point, etc. For example:

   Are people at the head of your company interested in their employees, or don't they care?

   Interested __________ . Don't care __________ . Other answer __________ . In what ways do they show that?

   The simple yes or no response (and similar choices such as agree or disagree, do or do not) are appropriate for many questions dealing with points of fact and with issues which are clear cut and on which well-crystallized views are held. Even on direct yes-or-no questions and simple two-way comparisons, however, it is usually found desirable to include an intermediate response of "doubtful," "not sure," or "no difference," etc. A graded series of response possibilities frequently gives the investigator additional or more accurate information than a dichotomous response and presents the question more adequately and acceptably to the respondent.

   The most common multiple choice responses utilize three, four, or five gradations. A widely used special form of multiple choice (the "cafeteria" question) asks the respondent to choose from a list of assorted words or statements the one(s) that best represents his or her point of view. The items may or may not be arranged in order from high to low, good to bad, etc. to form a crude scale. Examples of several of these forms follow:

   Suppose a person is asked by a close friend to do something that requires a personal sacrifice. In your country, how strong an obligation would a person of your age feel to help his friend?

   ________ not strong at all   ________ very strong

   ________ not very strong   ________ extremely strong

   ________ rather strong

   Put a "1" in front of the thing that is most important to have or to do in order to get ahead in the world. Put a "2" before the next most important, etc.

   ________ pull   ________ brains

   ________ good luck   ________ hard work

Of course, you want ALL these things—but which will influence you most when it comes to choosing your next car? Check 3 items.

______	appearance	______	operating economy
______	comfort	______	pickup
______	dependability	______	safety
______	ease of control	______	smoothness
______	first cost	______	speed

2. If a checklist is used, does it cover adequately all the significant alternatives without overlapping and in a defensible order?

Decisions About the Place of the Questions in the Sequence

1. Is the answer to the question likely to be influenced by the content of the preceding questions?

   Do earlier questions create a certain set of expectations that might influence answers to this question?

   Do preceding questions aid the recall of ideas that might bear on this question?

   Does the question become inappropriate if certain answers were given previously?

   When both general and specific questions are to be asked on a topic, it is usually advisable to have the general ones come first. Thus, if people are to be asked what improvements they desire in their working relations and also how they like their foreman, the first question must be placed before the second. Otherwise, better supervision will be disproportionately emphasized as a desired improvement simply because it has been freshly called to mind.

   Earlier questions may also create a generally favorable or unfavorable mental set toward the topic considered.

2. Is the question led up to in a natural way?

Decisions About Question Wording

1. Can the question be misunderstood? Does it contain difficult or unclear phraseology?

   Are the words simple enough for the least educated respondent?

   Are any terms used in a specialized way, and, if so, is the meaning made clear by pictures or otherwise?

   Is the sentence short and simple? Is there any looseness or ambiguity? What else could the question mean to a respondent?

   Is the meaning clearly distinguished from other ideas the respondent may think the question asks—ideas that may seem more natural or important to him or her?

   Could unintended emphasis on a word or phrase change the question's meaning?

   If any suspicion of misunderstanding remains after questions have been worded as clearly as possible, good practice calls for followup questions to determine just what the respondent meant. Calling for an example of what is meant may suffice.

Decisions About Question Content

1. Is the question necessary? Just how will it be useful?

   Does the subject matter require a separate question, or can it be integrated with other questions?

   Is the point already sufficiently covered?

   Is the question unnecessarily detailed and specific for the purpose of the study? For instance, instead of taking the age of each child in a family, it may be sufficient to get the number of children under 16. What is it you really want to know?

2. Are several questions needed on the subject matter of the question?

   Should the question be subdivided? Be careful of efforts to cut corners by combining two issues in one question, such as asking views about changes in wages and hours in the same question.

3. Does the question adequately cover the ground intended?

   For example, if you want information about total family earnings, a question about the respondent's "earnings" may be inadequate, since it may not lead him or her to mention "other income" or the earnings of others in the family.

4. In opinion questions, is further information needed about the intensity of the respondent's conviction or feelings?

   In connection with questions on sterotypes, for example, it may be important to find out not only whether the respondent has certain stereotypes, but also what emotion, if any, is attached to these stereotypes.

   Techniques for ascertaining intensity of opinion include "feeling thermometers," on which the respondent rates directly that he or she feels "very strongly," "fairly strongly," etc.; scales running from one extreme of feeling to the other; asking about the respondent's behavior (e.g., how much he or she has discussed the question or read about it; whether he or she has joined an organization or written to a newspaper, etc.).

5. Does the question need to be more concrete, specific, and closely related to the respondent's personal experience?

   Is it asked in too general a form? Can the information be obtained more easily by referring it more closely to the respondent's own behavior?

   Does it use psychological aids to aid in recall, such as having the respondent recall experiences in temporal sequence--working back from the present, etc.? For example, it is often effective to use behavior indicators instead of, or along with, subjective expressions of feeling. One can ask not only, "How did you like the book?" but also "Have you recommended it to anyone else?"

6. Will the respondent give the information that is asked for?

   Is the material too private, or embarrassing--likely to lead to resistance, evasion, or deception? What objection might a person have to answering? Does the question "put him or her on the spot," or make the respondent feel he or she is being quizzed? Can one get the information in a manner which would not offend, or should it be omitted? Do any special conditions exist at the time and place of the survey to augment suspicion or resistance?

Survey of Work Plans of Young People

1. In general, how do you feel about the opportunities that are open to young people today for getting jobs and earning a living? In comparison with, say, a generation ago, would you say that there are more opportunities now, fewer opportunities now, or about the same opportunities now?

   More now ________ Fewer now ________ Same ________ Don't know ________

2. About how much schooling do you think most young people need these days to get along well in the world? (Show card.)

   1. A grammar school education ________
   2. Some high school plus trade or business school ________
   3. A high school diploma ________
   4. A high school diploma plus trade or business school ________
   5. Some college plus trade or business school ________
   6. A college degree ________
   7. A college degree plus additional schooling ________

   No opinion ________

3. Suppose some outstanding young person asked your advice on what would be one of the best occupations to aim toward. What one occupation do you think you would advise him or her to aim toward? (Interviewer: write in respondent's answer and then code.) ________________________________

   ____

   Professional ________

   Semiprofessional ________

   Proprietor, manager, official (except farm) ________

   Farmer or farm manager ________

   Clerical, sales, or similar ________

Craftsman, foreman, or similar ______

Operative or similar work ______

Domestic service work ______

Protective service work ______

Other service work ______

Laborer (farm or nonfarm) ______

No opinion ______

4. What do you think is the most important single thing for a young person to consider when he or she is choosing a life's work? (Report verbatim.)

5. If you had a son or daughter graduating from high school would you prefer that he or she go to college, would you rather have him or her do something else, or wouldn't you care one way or the other?

College ______ Something else ______ Wouldn't care ______ Don't know ______

6. Suppose your son or daughter had a choice among three types of jobs: a secure job with a low income, a job with good pay but a 50-50 risk of losing it, or a job with extremely high income and a great risk of losing it. Which would you advise him or her to accept?

Secure job ______ 50-50 risk ______ Great risk ______ Don't know ______

7. If you had a son or daughter just getting out of school, would you like to see him or her go into politics as a lifework?

Yes ______ No ______ Don't know. ______

8. Do you think that today any young person with thrift, ability, and ambition has the opportunity to rise in the world, own his or her own home, and earn, say, $10,000 a year?

Yes ______ No ______ Don't know ______

9. Finally, I'd like to ask you a few questions about your family.

a. What kind of work does the head of your household do? (Interviewer: write in respondent's answer and then code below.) ______

______

(a) Head of house (b) Father

______ Professional ______

______ Semiprofessional ______

______	Proprietor, manager, official (except farm)	______
______	Farmer or farm manager	______
______	Clerical, sales, or similar	______
______	Craftsman, foreman, or similar	______
______	Operative or similar work	______
______	Domestic service work	______
______	Protective service work	______
______	Other service work	______
______	Laborer (farm or nonfarm)	______

b. What kind of work does (did) your father do? (Interviewer: write in respondent's answer and then code above.) ______________________________

c. What was the name of the last school you attended? ______________________________
______________________________ What was the last year you completed?
______________ (Interviewer: write in respondent's answer and then code in proper column below.)

Male	Highest grade completed	Female
______	Grammar school	______
______	Some high school	______
______	High school	______
______	Some college	______
______	College	______
______	Postgraduate	______

No wife/husband ________

d. What about the education of your wife/husband? (Interviewer: ask same questions as in *c* and then code in proper column above.)

e. Would you please look at this card and tell me which letter best indicates your total family income? (Show card.)

A. Less than $2,000 ______ D. $6,000-7,999 ______

B. $2,000-3,999 ______ E. $8,000-9,999 ______

C. $4,000-5,999 ______ F. $10,000 and over ______

f. Estimated age of respondent. (Interviewer: estimate, don't ask.)

20-29 ______ 40-49 ______ 60-69 ______

30-39 ______ 50-59 ______ 70-plus ______

g. Sex of respondent. Male ______ Female ______

h. Interviewer's rating of socioeconomic level.

Upper ______ Upper-middle ______ Lower-middle ______ Lower ______

i. Interviewer's name ______________________________

j. Date ______________

k. City ______________

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Sample Card

(front of card)	*(back of card)*
A young person today should have: 1. A grammar school education 2. Some high school plus trade or business school 3. A high school diploma 4. A high school diploma plus trade or business school 5. Some college plus trade or business school 6. A college degree 7. A college degree plus additional schooling	A. Less than $2,000 B. $2,000 - 3,999 C. $4,000 - 5,999 D. $6,000 - 7,999 E. $8,000 - 9,999 F. $10,000 and over

Teacher Interview Questionnaire

Date: ____________________

School & District: ____________________

Interviewer: ____________________

Interviewer: M F

Hello. I'm ____________________, and I'm with the General Learning Corporation in Washington, D.C. We are working with the Division of Planning, Research, and Evaluation in the State Education Department in Providence. Our main task is to help plan ways in which criterion-referenced tests might be developed and used constructively in Rhode Island. There is concern that the present testing program with standardized or norm-referenced tests is of only limited value to teachers, administrators, parents, and others.

As part of our study, we are talking with some teachers and others in a number of districts to obtain some first-hand information about how people go about setting goals, planning, testing, and evaluating educational programs for the students in Rhode Island.

This interview is strictly anonymous. We will not use your name, or identify your school or district as such. We would appreciate your views on various aspects of the matter.

1. First, what grade or grades have you taught this year? ____________________

2. Are there formal performance goals and objectives for all the __________ grade students in this district in each of the following areas?:

a. Reading:	Y ____	N ____	D/K ____
b. English (or other Language Arts)	Y ____	N ____	D/K ____
c. Science	Y ____	N ____	D/K ____
d. Math	Y ____	N ____	D/K ____
e. Social Studies	Y ____	N ____	D/K ____

2B.1. How are instructional programs presently planned and evaluated in the area you are most familiar with?

a. Reading

b. Other Language Arts

c. Science

d. Math

e. Social Studies

(Go to Q3)

2B.2. Does it vary for other subjects that you know of?

3. How do teachers determine the needs of students in the different subject areas at the beginning of the year?

4. During the year how do teachers at your grade level take into account individual differences?

5. Are you familiar with Project Open—the State Department's questionnaire about educational goals?

____ Yes

____ No

6. Would it be useful to you to have a definition and measures of general educational goals for all students (1) in basic skills and (2) in personal and social development?

1. ____ Yes (How) 2. ____ Yes (How)

____ No (Why not) ____ No (Why not)

7. What has been your experience in writing behavioral objectives? What subject areas?

(If some, go to Q7A)
(If none, go to Q8)

7A. What has been your experience in using test items keyed to behavioral objectives? What areas?

8. Do you see criterion-referenced tests as differing from present standardized or norm-referenced tests? (If yes, in what ways?)

NCAE Questionnaire

RETURN TO:

THE NATIONAL CENTER FOR ALCOHOL EDUCATION

1601 North Kent Street
Arlington, Virginia 22209

Application

I. Name: ____________________

Position: ____________________

Name and Address of Organization: ____________________

____

____________________ Telephone: ____________________

Date of Birth: ____________________ Sex: ______ M ______ F

Recovered Alcoholic: Yes ______ No ______ If yes, years sobriety ______

Education:

Highest grade completed ______

Type of degree ______

Years in current position: ____________________

Total years of administrative experience: ____________________

List two positions held immediately before becoming administrator of this program:

1. ____________________

2. ____________________

Have you had any previous training in:

Program management and administration Yes ______ No ______

Mobilization and use of community resources Yes ______ No ______

Evaluation of programs and services Yes ______ No ______

Are you responsible for more than one halfway house? ______________________

If so, how many? ______________________

What is the estimated population of the city where your program is located?

0 - 25,000 __________

25 - 50,000 __________

50 - 100,000 __________

100,000 & over __________

Do you consider this an:

Urban area __________

Suburban area __________

Rural area __________

Other (specify) __________

II. Profile of Program

Staffing

Number of full-time staff: ______________________

Positions: __________ , __________ , __________

__________ , __________ , __________

Number of part-time staff: ______________________

Positions: __________ , __________ , __________

__________ , __________ , __________

Number of volunteer staff: ______________________

Grants and Funding Sources

Total operating budget for previous year $ ______________________

Type	Amount/yr.	Do funding sources impose operating rules, regs., etc.?
Local	______	Yes ______ No ______
State	______	Yes ______ No ______
Federal	______	Yes ______ No ______
Third-Party Payments	______	Yes ______ No ______
Donations	______	Yes ______ No ______
Charities, foundations (United Fund, Community Chest, etc.)	______	Yes ______ No ______
Other (specify)	______	Yes ______ No ______

Client fees/year ______________________________

What is the weekly fee charged to resident? ______________________

Is this weekly fee negotiable? Yes ______ No ______

Does majority of client fees come from:

Client earnings? ______________

Subsidizing agencies (welfare, voc. rehab.)? ______________

What is the client capacity of your program? ______________ ______________

What is the average number of clients in residence at any point in time? ______________

Client Characteristics

Majority of clients are of what socioeconomic status? ______________

Majority ethnic population served:

White ______________

Black ______________

Spanish-speaking ______________

Other (specify) ______________

Clientele sex ratio:

All male ____________

All female ____________

Mixed ____________ percentage of men ________ percentage of women ________

Age range of clients ____________

Average age of clients ____________

Approximate length of client stay ____________

What percentage of your client intake comes from recruitment efforts? ____________

What percentage of your clients are self-referred? ____________

What percentage of client intake comes from referral sources? ____________

Major referral sources:

Legal – courts, probation, etc. ____________

Medical – hospitals, mental health centers, other treatment agencies, etc. ____________

Social Service Agencies – welfare, vocational rehabilitation, etc. ____________

Other (specify) ____________

Program Services

Services offered clients: ____________

Does program provide detoxification (medical withdrawal assistance) on premises for new or readmitted clients? ____________

Is A.A. involved in program services? In-house ________ Out-of-house ________

Advisory Boards

Does program have:

a. Advisory Board which represents a parent agency? ____________________

If so, name of parent agency: ____________________

b. Community Advisory Board? ____________________

Associations

Is there a halfway house association within your state? Yes ______ No ______

Are you or your program a member? Yes ______ No ______

Regulatory Agencies

Is your program regulated by standards at the:

a. State level Yes ______ No ______

b. Local level Yes ______ No ______

Do these standards:

a. Help program Yes ______ No ______

b. Hinder program Yes ______ No ______

Explain briefly: ____________________

____

____

Are you aware of standards that are being developed on a nationwide basis and why they are being developed? Yes ______ No ______

III. Needs

How do you think you would benefit by attending this training program? ____________________

____

____

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How do you think your program will benefit? __________

What do you feel are the most pressing problems you have in managing your program?

Internally: __________

In relation to other agencies: __________

In relation to community: __________

If you could acquire the use of a competent consultant, what would you use him or her for?

Halfway House Administrators' Training Program

Needs Assessment Form

To prospective training program participants:

It is our aim to conduct a training program on halfway house administration that will be as useful as possible to those who attend. To that end we ask you to consider topics that might be included and rate them in order of their importance to you in improving your ability to do your job effectively.

NCAE Staff

Directions: Listed below are six categories of knowledge and skills often needed by halfway house directors. Under each category (fiscal management, personnel, etc.) are listed some related topics. To help us design a training program most appropriate to your needs, please read each topic and circle the appropriate number as follows:

1 = important to include
2 = nice to include
3 = do not include
NA = "not applicable"; not part of my job

Then, in the space provided, add any topics not on the list that you think are important to include in the training program, or comment on the topics listed. For example, is there a particular aspect of that topic that you find particularly troublesome or that you think should be emphasized?

Fiscal Management

Annual budget preparation	1	2	3	NA
Monthly and quarterly reports	1	2	3	NA
Financial records	1	2	3	NA
Good business practices	1	2	3	NA
Third-party payments	1	2	3	NA
Insurance	1	2	3	NA
Contracting for goods and services	1	2	3	NA
Where to look for funds	1	2	3	NA
Money-saving techniques	1	2	3	NA
Director/board relationships	1	2	3	NA

Comments, suggested additional topics, etc.: ______________________________

____

____

____

Personnel

Staff requirements, schedules, coverage	1	2	3	NA
Job descriptions, duties and responsibilities	1	2	3	NA
Salaries, benefits	1	2	3	NA
Job satisfaction (career development)	1	2	3	NA
On-the-job training	1	2	3	NA
Hiring and firing	1	2	3	NA
Resolving conflicts	1	2	3	NA
Policies for field placements (interns, graduate students)	1	2	3	NA
Use of volunteers	1	2	3	NA
Evaluating job performance	1	2	3	NA
Making assignments, delegating responsibilities	1	2	3	NA

Comments, suggested additional topics, etc.: ______________________________

____

____

____

Program

Program description	1	2	3	NA
Intake criteria, procedures, policies	1	2	3	NA
Resident records	1	2	3	NA

Resident rights	1	2	3	NA
Physical environment	1	2	3	NA
Monitoring activities	1	2	3	NA
Fire, zoning, and building codes	1	2	3	NA
Accreditation and other operating requirements	1	2	3	NA

Comments, suggested additional topics, etc.: ____________________

____

____

____

Community Relationships

"Continuum of care" concept	1	2	3	NA
Influencing public policies and regulations on halfway houses, etc.	1	2	3	NA
Locating potential resources	1	2	3	NA
Affiliate agreements	1	2	3	NA
Public relations (use of media)	1	2	3	NA
Liaison with agency representatives	1	2	3	NA
Coordination of resources for individual residents	1	2	3	NA
Referrals	1	2	3	NA

Comments, suggested additional topics, etc.: ____________________

____

____

____

Planning

Determination of needs	1	2	3	NA
Setting realistic goals	1	2	3	NA
Establishing priorities	1	2	3	NA
Organizing and using information	1	2	3	NA

Comments, suggested additional topics, etc.: ______________________________

Using Data for Decisionmaking

As a basis for change	1	2	3	NA
Collecting relevant information	1	2	3	NA
Identifying problems	1	2	3	NA

Comments, suggested additional topics, etc.: ______________________________

Now that you have rated the above topics, please go back and indicate by using the numbers 1 through 6 the order of importance you attach to each category. For example, if you think Community Relationships is the most important category, place a "1" next to it. If you think Fiscal Management is second in importance, place a "2" next to it, and so on.

Thank you for the time you have taken to complete this form. Please add any other comments you think would help the planners of the training program.

Steps in Questionnaire Construction

(for flip chart 1)

What

Who

First Draft

Revise

Pretest and Edit

Procedures

Factors in Questionnaire Construction

(for flip chart 2)

The Form of Response

The Place in Sequence

The Wording

The Content

The Secretary's Hold Button
Problem Statement

The staff of an alcoholism treatment agency has received several complaints from clients about the telephone manners of the agency secretary. She is the person who handles all incoming calls. On two documented occasions in the past week, she has put acutely intoxicated clients on "hold" for 5 minutes or more, and her manner has been abrupt. The agency director has asked you, as the training officer, to meet with her in order to determine the cause of this problem.

Cast:

Antagonist—Secretary

Protagonist—Interviewer (Training Officer)

The Interview

The personal interview is one method of gathering data about the performance of an incumbent in a specific position. Talking with the worker's supervisor, the worker in person, or a group of workers offers the advantages of a quick exposure to the feelings and attitudes of the worker about his or her job, and a firsthand opportunity to gain the worker's assistance in analyzing the causes of performance problems. However, interviews are costly in terms of time and preparation, and the information gained from them is sometimes subject to the subjective interpretations of the interviewer.

There are two basic types of interview that you may want to use in a performance analysis:

The first type of interview is the standardized or structured interview. This type of interview will be most useful when you want to obtain the same type, quantity, and quality of information from all the people with whom you talk. The standardized interview consists of a series of predetermined questions which the interviewer asks of all interviewees in the same manner and order.

The second type of interview is the nonstandardized interview. This will be most useful when you want to explore broad problems with a number of people. It is used to gain increased understanding and insight rather than specific data.

There are four basic steps for the planning of any interview:

1. Whatever your needs are, and no matter which type of interview format you may use, you need to determine in advance what your objective is for the interview. Why precisely are you talking with this person or group, and what do you want to know when the interview is completed that you did not know before?
2. Once your objectives have been determined, select the areas which you will need to cover in the interview in order to achieve those objectives. All topics to be covered should be relevant, specific, and appropriate to the situation and to problems of both the interviewer and the interviewee.
3. Arrange the topics to be covered in a logical sequence. If you are planning a standardized interview, the topics need to be presented in the form of a series of questions designed to elicit the information you need. Use the same guidelines for the construction of these questions that you would use for the construction of a questionnaire. The questions need to be clear, short, unembarrassing, and understandable to the interviewee.
4. Plan in advance your introduction to the interview. You should cover the purpose of the interview, the group of people who will be interviewed, and how you will use this data when you have it. In some cases, it would be appropriate to offer to make the results of the series of interviews available to those involved once you have correlated and interpreted it.

Once you have completed these preparations, you need to pay some attention to the setting in which an interview will occur. Is privacy necessary to the success of the interview? People will talk more freely in a private setting. Is that what you want? Should the interview occur on your turf or theirs? People will feel more comfortable and at ease in their own offices, but they may also feel more in control; and thereby attempt to divert the purpose of the session. What atmosphere would be most conducive to your purposes? A neutral territory for example, a restaurant might be a solution.

What kind of atmosphere do you want to create? If you sit across a table from the interviewee, a feeling of equality and task orientation may result. If you are behind a desk, he or she will feel subordinate. If you sit together with nothing between you, you will create a more relaxed, social atmosphere. A walk together while talking will create the same feeling with a sense of activity that may result in a more impactful role for the interviewee.

Your personal style will also have great impact on the responses of the interviewee. Those of you with counseling backgrounds know all the tricks here. In an unstandardized interview, open-ended questions will elicit more information than a yes-no question. Above all remember the fact that your job is to gather information, not to judge it or the person who gives it. Don't argue or criticize either verbally or attitudinally. This will only stop the flow of information from the interviewee. If you are dealing with an issue that is sensitive to the interviewee, let the person know that you understand what he or she is saying by feeding back to him or her your perception of what is being said. "In other words . . .," and "What I hear you saying is . . ." are two good ways to begin that enable you to check the accuracy of your perceptions while you let the interviewee know that you care and hear what he or she is telling you.

Group interviews can reveal the dynamics of a work situation and also provides interviewees with the sounding boards they sometimes need to provide verbal information. If you keep the objectives of the interview clearly in your mind, you should be able to sit back and listen to the group, throwing in questions or comments designed only to keep the group on course. This is also one way of eliminating the time/cost factor of interviews, but it sometimes fails to elicit accurate or complete information because the anonymity factor is not present.

Interview Checklist

The following checklist is provided to assist in reviewing interview sessions:

1. Are the objectives clearly defined?
2. Is the introductory statement complete and convincing?
3. Does the schedule deal with items that respondents are likely to feel genuinely important?
4. Have trivial and irrelevant questions been avoided?
5. Do the questions avoid unnecessary details or specifications?
6. Are the questions clear and unambiguous?
7. Do the questions fit the respondent's situation?
8. Are leading questions avoided?
9. Do the questions encourage the respondent to be definite in his or her answers without forcing definiteness where it is inappropriate?
10. Do the questions elicit responses of sufficient depth to avoid superficiality?
11. Are questions asked in such a way that the respondent will not be embarrassed?
12. Are questions asked in such a way that the respondent will not feel that there is a hidden purpose in the interview?
13. Do the questions permit the respondent to present his or her own point of view or frame of reference?
14. Is the schedule complete?

Antabuse

Problem Statement

An alcoholism treatment facility has recently hired a psychiatrist to prescribe Antabuse to some of its clients. In the 3 months he has been there, only one client has been referred to him for Antabuse by the counseling staff. The director of the agency has asked you, as a trainer, to meet with the senior counselor of the agency. The purpose of the meeting is to determine the cause of the performance problem.

The Cast:

Antagonist—Senior Counselor

Protagonist—Interviewer

The Recordkeeping Problem

Problem Statement

An alcoholism treatment agency has been told by the JCAH accreditation team that it will be denied accreditation unless it revises its recordkeeping system. Up until now, the counselors have kept no record of treatment plans for clients or of the implementation and evaluation of such treatment plans. The agency director and a training officer from another nearby alcoholism agency are meeting to determine the cause of this problem. The trainer has been asked by the director to provide consultation on the development of a training solution to this problem.

The Cast:

Antagonist—Director

Protagnoist—Training Officer

Interview Planning Guide

1. What are your objectives for this interview?

2. What topics do you need to cover in order to achieve your objectives?

3. In what order will you cover these topics?

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Job Descriptions

Job Description:

Director, Alcoholism Treatment Agency

Duties: To take administrative and supervisory responsibility for staff of four professionals and six paraprofessionals.

To take programing and community coordination responsibility for a comprehensive, community-based agency.

To be responsible for insuring a level of agency functioning that will meet JCHA accreditation standards.

Job Description:

Alcoholism Counselor, City Health Department, Alcoholism Treatment Unit

Duties: To be responsible for a treatment case load of 25 individuals, from intake through treatment termination. Must be capable of both group and individual counseling, and of functioning on a multidisciplinary team. Some community education and inservice training responsibilities.

Job Description:

New Father of Twins

Duties: Must be responsible for insuring dependable income, providing emotional support for new mother, and sharing infant-care responsibilities from 6 p.m. to 6 a.m. weekdays and full time on weekends and holidays.

Selection Criteria

(for flip chart 1)

Common need of the learner
Common interest of the learner
Mixed or shared characteristics
Time and resource constraints

Examples of Common Need

Examples of the common-need basis of training group selection are:

(1) **Training Secretaries**

Not all secretaries need to know how to take shorthand; for example, some might have access to Dictaphone equipment. Before undertaking training of any secretarial groups, therefore, the trainer should perform a training group analysis that would determine which secretaries need to know shorthand. Specific groups for those who do need to know and those who don't can then be formed.

(2) **Training Managers of Training Programs**

A training program for training managers might be broken down into those who need to know delivery skills and those, such as managers of training programs, who do not.

(3) **Counselor Training**

Counselors function best when using counseling methods with which they are comfortable. Therefore the initial training group analysis should separate the group as a whole into smaller units based on a common degree of comfort with particular methods.

Self-Test

A. Do the following statements include performances? Does each at least tell what the learner will be doing when demonstrating achievement of the objective?

	States a Performance YES	NO
1. Understand the principles of salesmanship.		
2. Be able to write three examples of the logical fallacy of the undistributed middle.		
3. Be able to understand the meaning of Ohm's Law.		
4. Be able to name the bones of the body.		
5. Know the needs for nursing care associated with the stresses of life situations and with common aspects of illness.		
6. Be able to *really* understand the plays of Shakespeare.		
7. Be able to identify (*circle*) objectives that include a statement of desired performance.		
8. Be able to recognize that the practical application of democratic ideals requires time, adjustment, and continuous effort.		
9. Appreciate the ability of others, and perform as an intelligent spectator.		
10. Be able to describe the indications for the use of a pacemaker.		

Source: Mager, R.F. *Preparing Instructional Objectives* (2d ed.) (Belmont, Calif.: Fearon Publishers, Inc., 1975), pp. 124-26, 128, 130.

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Self-Test

B. Read the statements below. Place a checkmark in the appropriate column to indicate any characteristic of a useful objective you find in each.

	PERFORMANCE	CONDITIONS	CRITERION
11. Demonstrate a knowledge of the principles of magnetism.	___	___	___
12. Be able to write an essay on evolution.	___	___	___
13. Using any reference materials, be able to name correctly every item shown on each of 20 blueprints.	___	___	___
14. Be able to write a description of the steps involved in making a blueprint.	___	___	___
15. On the 25-yard range, be able to draw your service revolver and fire five rounds from the hip within 3 seconds. At 25 yards all rounds must hit the standard silhouette target.	___	___	___
16. Be able to know *well* the cardinal rules of grammar.	___	___	___
17. Given an oral description of the events involved in an accident, be able to fill out a standard accident report.	___	___	___
18. Be able to write a coherent essay on the subject "How to Write Objectives for a Course in Law Appreciation." Course notes may be used, as well as any references.	___	___	___
19. Be able to develop logical approaches in the solution of personnel problems.	___	___	___
20. Without reference materials, be able to describe three common points of view regarding racial inferiority or superiority that are not supported by available research.	___	___	___

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Self-Test

How'd You Do?

	States a Performance YES	States a Performance NO
1. Understand the principles of salesmanship.		✓
2. Be able to write three examples of the logical fallacy of the undistributed middle.	✓	
3. Be able to understand the meaning of Ohm's Law.		✓
4. Be able to name the bones of the body.	✓	
5. Know the needs for nursing care associated with the stresses of life situations and with common aspects of illness.		✓
6. Be able to *really* understand the plays of Shakespeare.		✓
7. Be able to identify (*circle*) objectives that include a statement of desired performance.	✓	
8. Be able to recognize that the practical application of democratic ideals requires time, adjustment, and continuous effort.		✓
9. Appreciate the ability of others, and perform as an intelligent spectator.		✓
10. Be able to describe the indications for the use of a pacemaker.	✓	

Self-Test

Performances are circled.
Conditions are underlined.
Criteria are in italics.

	PERFORMANCE	CONDITIONS	CRITERION
11. Demonstrate a knowledge of the principles of magnetism.			
12. Be able to write an essay on evolution.	✓		
13. *Using any reference materials*, be able to name *correctly every item shown on each of 20 blueprints.*	✓	✓	✓
14. Be able to write a description of the steps involved in making a blueprint.	✓		
15. On the 25-yard range, be able to draw your service revolver and fire five rounds from the hip *within 3 seconds. At 25 yards all rounds must hit the standard silhouette target.*	✓	✓	✓
16. Be able to know *well* the cardinal rules of grammar.			
17. Given an oral description of *the events involved in an accident*, be able to fill out a standard accident report.	✓	✓	
18. Be able to write a coherent essay on the subject "How to Write Objectives for a Course in Law Appreciation." *Course notes may be used, as well as any references.*	✓	✓	
19. Be able to develop logical approaches in the solution of personnel problems.			
20. *Without reference materials*, be able to describe *three common points of view* regarding racial inferiority or superiority that are *not supported by available research.*	✓	✓	✓

Self-Diagnostic Work Sheet

CHARACTERISTICS OF ADULT LEARNERS	THINGS I DO THAT FULFILL THESE CHARACTERISTICS	THINGS I DO THAT VIOLATE THESE CHARACTERISTICS
1. Self-concept		
2. Accumulated Experience		
3. Readiness to Learn		
4. Immediacy of Application		

Discussion Questions

(for flipchart 1)

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

Methods Categories

1. Presentation Methods

   Lecture
   Television Video Tape
   Debate
   Dialog
   Interview
   Symposium
   Panel
   Demonstration
   Motion Picture, Slides
   Recording, Radio
   Dramatization
   Exhibits
   Annotated Reading Lists
   Programed Instruction
   Self-instructional Materials

2. Participation Methods—Large Group

   Question and Answer Period
   Forum
   Listening Teams
   Reaction Panel
   Buzz Groups
   Audience Role Play

3. Participation Methods—Small Group

   Brainstorming
   Case Discussion
   Guided Discussion
   Book-based Discussion
   Problem-solving Discussion
   Creative Thinking
   Fishbowl

4. Simulation Methods

    Role Play
    Critical-incident Process
    Case Method
    In-basket Exercises
    Games

5. Human Relations Methods

    T-Groups
    Laboratory Training
    Sensitivity Training
    Nonverbal Exercises
    Values Clarification Exercises

Sample Action Words to Describe Expected Learning Outcomes

Cognitive Domain*

associate	choose	characterize	calculate	adapt
identify	compare	classify	compile	administer
indicate	contrast	group	compute	analyze
label	decide	match	convert	create
locate	differentiate	rank	define	develop
name	recognize	rate	determine	diagnose
reply	select	specify	diagram	formulate
state		tabulate	evaluate	synthesize
cite			interpret	
enumerate			organize	
list			plan	

Affective Domain

like	empathize
excited	appreciate
patient	approve
comfortable	interested
alert	independent
sensitive	confident
respect	

Psychomotor Domain

grasp	assemble
lift	copy
press	insert
pull	load
rotate	remove
tighten	replace
turn	trace
twist	type

* The words in this category are organized into five columns of increasing complexity. The words in the first column describe behaviors requiring recall of facts; the words in the last column describe behaviors of a problem-solving [illegible]

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Types of Learning Task Sheet

Cognitive Learning Objective

Affective Learning Objective

Psychomotor Learning Objective

Appropriate Methods

Cognitive Type of Learning Outcome (Knowledge, Understanding)

PRESENTATION

- Lecture
- Television, Video Tape
- Debate
- Dialog
- Interview
- Symposium
- Panel
- Group Interview
- Demonstration
- Colloquy
- Motion Picture
- Slide Film
- Dramatization
- Recording
- Exhibits
- Field Trips
- Reading
- Computer-assisted Instruction
- Essays
- Exams

AUDIENCE PARTICIPATION

- Question-and-Answer Period
- Forum
- Listening Teams
- Audience Reaction Panel
- Buzz Groups
- Audience Role Playing
- Case Discussion
- Case Method

Adapted and reprinted by permission from Malcolm Knowles, *Modern Practice of Adult Education* (New York: Association Press, 1970), p. 292.

Affective type of learning outcome (attitudes, values, interests)

- Experience-sharing discussion
- Role playing
- Case method
- Games
- T-Group
- Nonverbal exercises
- Counseling
- Consciousness-raising groups
- Performing arts, dramatization
- Field trips
- Values clarification exercises
- Some presentation techniques

Psychomotor types of learning outcomes (performing physical skills)

- Skill clinic
- Drill
- Coaching
- Behavior modification
- Simulation games
- Demonstration and practice
- Internship

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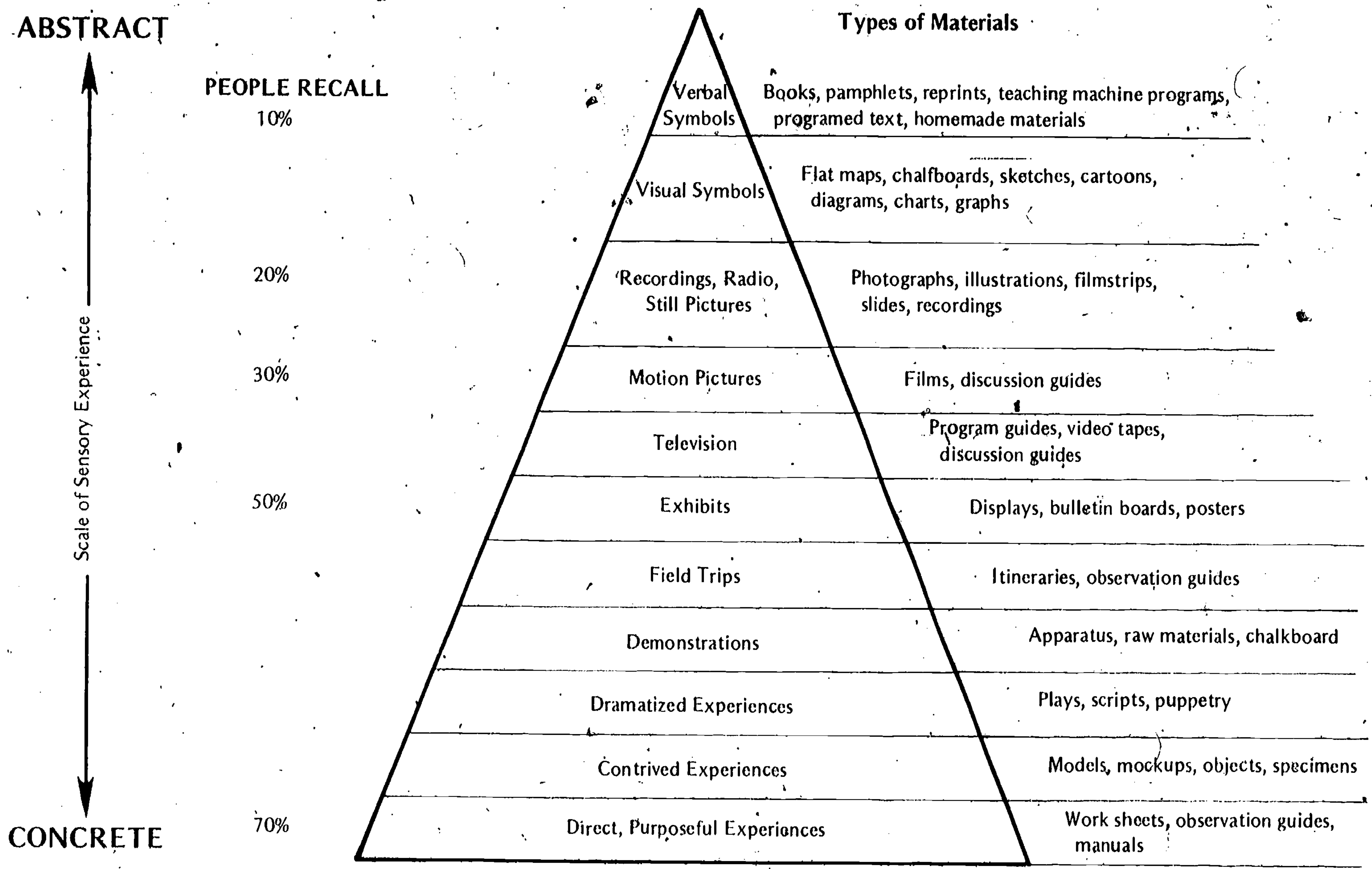
The Cone of Experience



From Edgar Dale, *Audio-Visual Methods In Teaching*, rev. ed. (New York: Holt, Rinehart, and Winston, 1946, 1954), p. 00. Reprinted by permission of Holt, Rinehart, and Winston.

Lecture

What

A carefully prepared oral presentation of information presented for the purpose of having others understand the information or to motivate or influence the attitudes of the listeners.

When

Factors which influence choice of the lecture as the teaching method are:

1. degree of expertise or knowledge of the instructor in relation to group knowledge. Where is the knowledge? If it is in the group already, the trainer should use the group.
2. the size of the learning group—20 or more.
3. time available—a lecture is quick.
4. availability of other self-instructional materials.
5. goals of the training activities.

Advantages

The lecture offers a more direct and controlled flow of information than other methods. It:

1. conserves time,
2. is a persuasive technique,
3. presents a system and order for a large volume of facts,
4. can make effective use of audiovisual aids, and
5. can make information available to those who cannot use printed materials.

Disadvantages

The lecture:

1. may be dull,
2. lacks group participation,
3. requires more lengthy research preparation,
4. requires speaking ability, and
5. focuses on the instructor rather than the learner.

Components of a Good Lecture

A good lecture should:

1. motivate group interest and link the subject matter to the interest, values, and needs of the audience.
2. be well organized and clear. Learners in the "audience" role are not used to working very hard on the activity. Use orderly sequence, clear transitions, etc.
3. be well developed.
4. be well presented in terms of physical, vocal, and attitudinal factors.

How to Prepare

1. Analyze the learning group. Start with the learner and assess what he or she knows already, his or her needs and characteristics (age, education, readiness to learn, etc.).
2. Determine the goal (exact purpose) to be accomplished. Why does the learner need to know, by when, how will it be used?
3. Determine the main points and do necessary research. Limit the number to three or four—audiences can't handle more than four points.
4. Organize main points, subpoints, and materials. Determine sequence (time, space, logical, topical, easy-to-difficult, interest level, cause-to-effect, problem and solution, etc.) in advance.
5. Develop and support the points. Several development techniques or methods can be used depending on the objective. For example:

   to instruct:

   a. explanation process
   b. definition process
   c. classification process
   d. description
   e. narration

   to persuade:

   a. appeal to emotions, feelings
   b. reasoning process
   c. human interest stories
   d. use of *vivid* detail

   to illustrate:

   a. comparisons
   b. statistics and data
   c. quotations
   d. specificity—actual names, places, happenings, events (we lose interest in the abstract)
   e. use of familiar, close-to-home examples
   f. human interest

6. Analyze the environment; for example, will a microphone be needed?

Sample Outline of a Good Lecture

Lecture topic: (Title)
Goal (Purpose): (Sentence or two)
Nature of Audience: (Paragraph)

INTRODUCTION

I. Interesting and arousing opening sentence (gain attention).

II. Relation of topic to group (establish common ground).

BODY

I. Statement of purpose and summary of main points.

II. Examples.

III. Illustrations.

IV. Full development of subpoints with examples and illustrations.

CONCLUSION

I. Summary of points.

II. Future application of this material.

III. What will be covered at next session.

Adapted and reprinted by permission from "The Lecture" by Harold P. Zelko in *Training and Development Handbook*, Robert L. Craig and Lester R. Bittel, (eds.), (New York: McGraw-Hill, 1967), pp. 141-153.

Demonstration

What

A demonstration is a carefully prepared presentation that shows how to perform an act or use a procedure. It is accompanied by appropriate oral and visual explanations, illustrations, and questions. The basic process is *show* and *tell* and *practice*.

When

Use a demonstration to:

1. teach how to perform an act, use a new procedure, or product;
2. promote confidence that a procedure is feasible for the learner to undertake;
3. promote interest in learning and use of a procedure; and
4. present procedures that are demonstrable and for which an expert is available.

Advantages

The demonstration offers the opportunity for:

1. practice under expert guidance;
2. immediate correction of error; and
3. more direct experience of learning than oral or written presentation of same material.

Limitations

The demonstration:

1. may be expensive, bulky, and inconvenient;
2. should be restricted to a small number of learners (one-to-one would be best); and
3. suffers when a clumsy demonstration leads to unfavorable audience reaction.

Components of a Good Demonstration

A good demonstration should:

1. present demonstrable procedures;
2. be given by a qualified demonstrator who is accepted by the learners;
3. make use of real, not simulated, equipment (Situations may be simulated; for example, an airplane cockpit is real but the situation—flying—is not.);
4. give each learner a chance to practice;
5. have the services of a logistics chairman to work along with the demonstrator;
6. include effective safety precautions; and
7. take place in a comfortable environment;
8. have provision for showing evidence of learned skill for each learner; and
9. separate *showing* from *telling* clearly.

Adapted and reprinted by permission from "Training-Aids" by Louis S. Goodman in *Training and Development Handbook*, Robert L. Craig and Lester R. Bittel, (eds.), (New York: McGraw-Hill, 1967), pp. 318-320.

How to Prepare and Present

1. Analyze the learning group.
2. Determine the goal.
3. Select personnel.
   a. Demonstrator: If more than one is required, all persons should be able to work smoothly;
   b. Commentator: Can be used to explain what someone else is doing; must be as much an expert as the demonstrator; commentary must not *upstage* the demonstration.
   c. Chairman: Handles arrangements, introduces demonstrators, concludes the session. Does not have to be an expert.
4. Write up a scenario or script.

Sample Outline of a Good Demonstration

I. Prepare the workers:
   1. Put them at ease.
   2. State the job to be learned.
   3. Find out what is already known about the job.
   4. Get them interested in learning the job.
   5. Arrange them in correct position to learn.

II. Present the operation:
   1. Tell, show, and illustrate. Illustrate means to embellish the "showing" with examples, comparisons, pictures, etc..
   2. Take one step at a time—follow rigid sequence.
   3. Stress key points (identify area of difficulty—most tasks have only a 5 percent or 10 percent area of difficulty).
   4. Summarize, repeat, and question to establish understanding.

III. Practice performance:
   1. Have worker perform the task.
   2. Have worker identify area of difficulty and stress key points.
   3. Make sure worker understands by asking:
      "Why do you __________?"
      "What would happen if __________?"
      "What else do you do?"
      "What do you do next?"
   4. Repeat where necessary.

IV. Followup (supervisor's role):
   1. Put worker on his own.
   2. Designate a helper.
   3. Encourage questions.
   4. Taper off training supervision.
   5. Institute regular supervision.

Structured Role Play

What

Role play is a directed method of human interaction that involves realistic behavior in imaginary situations. Its purpose is to teach.

There are two principal types of role play:

1. Spontaneous—a laboratory technique that offers insight into personal behavior, and
2. Structured—a dramatic instructional process that focuses on facts and relationships.

A structured role play may be covert or open. Under open conditions, all information is known to all participants with no secrets, hidden agenda, or special instructions. Under covert conditions, certain information is withheld or special instructions are given to the players independently.

Characteristics

A role play:

1. is distinct from acting (performing art), psychodrama (spontaneity of players), and sociodrama (directed at the audience);
2. does not require dramatic ability—don't ham it up;
3. should clearly illustrate the principles to be taught, not the techniques of illustrating; and
4. must be under the firm control of the trainer.

When

Role play should be used when the goal is in the areas of:

1. human relations problems,
2. leadership training,
3. establishing trust climate,
4. teaching attitudes,
5. consciousness raising,
6. collective bargaining, and
7. problem-solving skills.

Advantages

A good role play:

1. maximizes active role of learner,
2. gives players and observers the opportunity to learn through observation and feedback, and
3. offers rapid communication of personal values and attitudes.

Disadvantages

The role play:

1. is a high-risk technique for the trainer, as players frequently feel embarrassment, resent "discovery," turn hostility toward trainer;
2. requires control and precise learning objectives;
3. is difficult to evaluate for effectiveness;
4. can erode trainee confidence in trainer;
5. causes fear and anxiety in players; and
6. technique may obscure the subject matter.

Components of a Good Role Play

A good role play has:

1. precise statements of training objectives,
2. a clearly stated problem area,
3. thoroughly researched case data,
4. an antagonist role,
5. a protagonist role,
6. preparation time for role players,
7. preparation of observers,
8. controlled enactment, and
9. structured postenactment.

How to Prepare:

Writeup

1. Identify a general problem area.
2. Collect data—facts, typical incidents, etc.
3. Determine specific training goals.
4. Write the case:
   a. description of background and setting,
   b. description of each player's role, and
   c. observation guides to assist audience in analyzing what you want them to look for.
5. Prepare a discussion plan to assist in developing key points when the role play is complete.

Enactment and Discussion

1. Describe the problem area.
2. General discussion to allow some personal identification with the problem.
3. Distribute materials:
   a. observer forms,
   b. background information, and
   c. role briefs (ahead of time for covert). Establish understanding by asking role player: "What do you understand to be the essentials of your role?"

4. Enactment of 10–15 minutes. Keep the enactment:
   a. controlled; i.e., do not allow the player to introduce new data;
   b. strictly timed;
   c. neutral—don't be a therapist. In open role play switch roles if a challenge is too dramatic, and make the challenger meet his or her own challenge.
5. Discussion:
   a. Problems,
   b. Issues raised,
   c. Relationships, and
   d. Alternative strategies.

Examples of Role Play Protagonist-Antagonist Titles

Protagonist	Antagonist
Board Member	Stockholder
Counselor	Client
Fiscal Officer	Line Manager
Husband	Wife
Wife	Husband
Instructor	Student
Interviewer	Interviewee
Manager	Supervisor
Military Officer	Enlisted Man or Woman
Parent	Child
Pastor	Parishioner
Physician	Patient
Salesperson	Client
Shop Steward	Employee
Staff Specialist	Line Manager
Supervisor	Employee

The **protagonist** is one who carries the burden or responsibility for decisionmaking. He or she has the power or authority to act or to reconcile a conflict. The protagonist generally outranks the antagonist and is the trainee to whom the issue is presented, the role player who is on the hot seat, or the person who supports or advocates a position when seeking to solve a problem.

Desirable Behavior:

Listens, is openminded, noncritical, nondirective, supportive, focuses on problem, sincere, looks at antagonist.

Undesirable Behavior:

Talks excessively, pitches his or her approach to "sell" own point of view, fails to listen, closeminded, shows displeasure, argues, sarcastic, insincere, talks to wall.

The **antagonist** is generally subordinate to the protagonist and is displeased with some action past or present or likely to be taken in the future. He or she is someone who is unconvinced and challenges the authority of the protagonist—one who is adversely affected by some action and may be frightened.

Antagonist Behavior:

Normally, the antagonist will, at the outset, reveal behaviors such as: sullen, talks excessively, needles, critical or sarcastic, exhibits facial expressions of unhappiness or displeasure, or argues.

Brainstorming

What

Brainstorming is a technique whereby creative thinking takes precedence over the practical. The idea is to put before the group all ideas possible with no thought to the practicality of the ideas. The participants are urged to be as "freewheeling" and uninhibited as possible.

When

Brainstorming may be used:

1. to put as many new and novel ideas as possible before the group for evaluative discussion,
2. to encourage practical-minded individuals to think beyond their day-to-day problems and to think quantitatively instead of qualitatively,
3. to move out on a problem when the more conventional techniques have failed to come up with a solution, and
4. to develop creative thinking.

Advantages

1. Many people are thrilled at the freedom of expression inherent in brainstorming.
2. Solutions to previously insoluble problems can be discovered.
3. All members of the group can be encouraged to participate.

Disadvantages

1. Many individuals have difficulty getting away from practicalities.
2. Many of the suggestions made may not be worth anything.
3. In the evaluation session it is necessary to criticize the ideas of fellow members.

Physical Requirements

1. A meeting room with a chalkboard or other surface on which the ideas produced can be written hurriedly and preserved for the followup discussion period.
2. A conference table or semicircle arrangement to expedite discussion following the brainstorming.

Procedure

1. The chairperson explains the procedure to be used, and a recorder is selected to list the suggestions.
2. As ideas are thrown out they are recorded in public view.
3. The ideas are discussed to determine if any have practical application to the problem at hand.

Similar Methods and Techniques

Brainstorming is different from any other group technique, although principles of group discussion and buzz sessions are much in evidence.

Listening Team Assignments

(for 3 x 5 cards)

Write out listening team assignments on separate 3 x 5 cards or slips of paper before session begins.

Team 1

Listen to the presentation on the lecture and discuss: What did we hear that was new? Old?

Team 2

Listen to the presentation on the demonstration and discuss: What did we hear that was new? Old?

Team 3

Listen to the presentation on the structural role play and discuss: What is the role of the trainer in the role play?

Team 4

Listen to the presentation on creative thinking and discuss: What is the role of the trainer in this technique?

Model Learning Activity

Session No. *Title: Director/Board Relationships* *Day:*

Goals/Objectives: Each participant will attain increased awareness and understanding of the elements and issues associated with organizing and maintaining effective relationships with the halfway house board of directors that have been demonstrated to be successful in other halfway houses.

They will be able to:

1. list at least three types of people to include on the ideal board and explain how they can be helpful, and
2. name two strategies for dealing with a troublesome board.

Time Required: 3 hours

Equipment: Video tape equipment (optional, but strongly recommended)

1 microphone 2 cameras 1 VTR tape deck 1 monitor 1 mixer	or	1 portapack 1 VTR tape deck 1 monitor 1 microphone

Materials:
Handout 1–Director/Board Guidelines
Handout 2–Case Study: Pathway Residence
Handout 3–Board/Director Problem Sheet
Handouts 4a-4f–Instructions for Role Players
Handout 5–Guide for Role-Player Observers (place in envelopes with name the night before)
Handout 6–Group Process Observation Sheet (from session 2)
Handout 7–Hidden Agendas Information Sheet

Primary Methods: Group discussion; role playing

Meeting Arrangements: In one room, drawing 1–roundtable setup; in a second room, drawing 6–discussion set up for six people, with sufficient chairs surrounding the circle for the remaining participants. Video equipment placed so that each role player can be easily photographed, especially when talking. Microphone should be placed to record all speakers audibly.

Code: HH

Session No.

Time	*Sequence of Activities*	*Materials*
30 min.	A. Introduction 1. Review purpose of session.	
	2. Distribute the Director/Board Guidelines.	A2. Handout 1—Director/ Board Guidelines
	3. Discuss the items with contributions from the group.	
60 min.	B. Role-Playing Exercise (If video equipment is not available, carry out exercise as directed.) 1. Explain that the next activity is a role-playing exercise designed to dramatize some of the difficulties that may arise on a halfway house board. These background materials will set the stage. The night before, decide who will play each role and put the appropriate instructions and role description (handout 4) in an envelope bearing the participant's name. Choose people whom you think will be least self-conscious in a role-playing situation.	
	2. Distribute handouts 2 and 3, Case Study: Pathway Residence and Board/Director Problem Sheet and allow participants about five minutes to read.	B2. Handout 2—Case Study: Pathway Residence; Handout3—Board/Director Problem Sheet
	3. Announce that different participants will do different things in the exercise. Distribute role-player envelopes to selected participants and instruct those participants to retire to room 2, take a seat in the inner circle of chairs, and read their instructions.	B3. Handouts 4a-4f—Instructions for Role Players

Title: Director/Board Relationships

Points for Discussion

A. Introduction

1. An active, cooperative board of directors can be an indispensable resource to a program administrator. This session will focus on some of the elements of an effective board and some of the things an administrator should consider in establishing and maintaining a sound working relationship with the board. In this exercise, the administrator is a halfway house director, but the concepts are generally applicable.

3. Under Item 6 of the Director/Board Guidelines you may wish to add these points:
   - Banker — Any bank officer is helpful, but if you are planning to purchase property, it may be especially useful to have a banker from the mortgage department.
   - Legislator — This person can be particularly helpful in working out problems with public agencies such as licensing bureaus.

Other agencies to consider for board representation, depending upon the needs of the house, are State, county, or municipal employment services; unions; churches; educational institutions; Salvation Army; and police department.

B. Role-Playing Exercise

There are no discussion points for this section.

Session No.

Time		*Sequence of Activities*	*Materials*
		4. Distribute handout 5—Guide for Role-Player Observers to selected participants and handout 6—Group Process Observation Sheet to the rest. Answer questions.	B4. Handout 5—Guide for Role-Player Observers Handout 6—Group Process Observation Sheet
		5. All observers move to room 2 and sit in chairs around inner circle.	
		6. Inform role players that the other participants are observers. Ask them to introduce themselves as the characters they are playing and begin the meeting. (Video taping starts here. Use introductions to check for placement of cameras and microphones. Be sure cameras can focus without obstruction on each role player as he or she talks and that each voice records audibly.)	
		7. After 15 minutes, terminate role playing whether the play has been completed or not.	
		8. Ask the group process observers to report their observations.	
		9. Ask role player observers to report their observations.	
		10. Ask role players to read their roles to the group in the order they appear on the problem sheet.	
25 min.	C.	Hidden Agendas	
		1. Distribute the Hidden Agenda Information Sheet, handout 7, and read the introduction to the group.	C1. Handout 7—Hidden Agenda Information Sheet
		2. Lead a discussion of the role-play situation, asking participants to draw on their observations either of the group process or the role players and on reports by the role players of their intentions and feelings. See questions opposite.	

Title: Director/Board Relationships

Points for Discussion

C. Hidden Agendas

2. Aim toward generalizations that answer these questions:
   a. How do hidden agenda affect the group; how do they affect each member?
   b. What are some indicators that hidden agenda are operating?
   c. Is the recognition of hidden agenda necessary to understand what is going on in the group?

Session No.

Time	*Sequence of Activities*	*Materials*
15 min.	Coffee Break (During break, rewind tape and set up monitor in room 1 where all participants can see screen.)	
45 min.	D. Video Tape Replay 1. Play through the tape once completely without comment, asking participants to observe and note the following: a. Examples of group process functions (task, maintenance) and obstructing actions. b. Examples of nonverbal behaviors that convey feelings that role players have reported. 2. Play tape again, this time stopping tape on signal from either you or participants to point out examples of either category (a or b above). E. Summary Summarize major points.	

120

Points for Discussion

D. Video Tape Replay

If video equipment is not available, lead a discussion asking for the same examples as listed opposite. Less time will be required if video tape is not used.

E. Summary

1. Touch briefly on seven points listed on Hidden Agenda Information Sheet.
2. Suggest that participants read remaining paragraphs at their leisure.
3. Cite general implications of this exercise for director/board relationships.

Human factors are as important as organizational ones in the functioning of a board. It is important for a director to know each of his or her board members.

Learning Activity Handout 1—Director/Board Guidelines

1. State laws on organization of nonprofit corporations vary.
   a. Variances can be obtained within states.
   b. State attorney's office will render a decision on ambiguous or disputed points without charge.
2. The history of a halfway house and the personalities involved will greatly affect a particular situation.
3. If a halfway house is one component of a comprehensive alcoholism program, it should have a separate board of directors (e.g., mental health boards too medically oriented).
4. Model bylaws appear in AHHAP guidelines.
5. Generally, the following recommendations are made:
   a. Term of office averaging 2 to 3 years;
   b. An automatic termination clause be written into bylaws;
   c. Board members be encouraged to attend national meetings such as AHHAP whenever possible; and
   d. A five- to seven-person executive board is best working size; maintain an advisory board for public relations purposes (prominent citizens, Senators, or Congresspersons) whose members are kept informed monthly by mail.
6. The ideal executive board is composed of the following:
   a. banker;
   b. lawyer;
   c. legislator (State or city);
   d. physician (internal medicine, *not* psychiatry);
   e. recovered alcoholic;
   f. accountant, businessperson, or public relations/media person.
7. No one from State alcoholism program should be on executive board because of possible conflict of interests; may be on advisory board.
8. Director may or may not be a member.
   a. He or she is responsible for implementing policy.
   b. Familiar with day-to-day operation of house, problems, impact of policy changes.

Learning Activity Handout 2—Case Study: Pathway Residence

Pathway was founded in 1970 as a nonprofit halfway house program by a community group under the leadership of the Blairville Council of Churches. A fund drive raised money to furnish an 18-room house donated anonymously by a wealthy church member.

Program Goals

Pathway was founded "to aid and assist alcoholic men who manifest a desire for rehabilitation" and "to provide food, shelter, and counseling in order to assist the alcoholic person in his recovery."

Program Description

Pathway accommodates 24 people and averages 20 at any one time. The residents range in age from 21 to 72. The average age is 47. All residents are referred from either legal or medical sources. Most of the residents are from the lower income level and qualify for semiskilled or unskilled jobs. Residents pay $30 per week when they are employed, and the average length of stay is 9 months.

The program includes group therapy, A.A., Bible study, and individual counseling (including vocational and pastoral). For other needs, residents are referred to cooperating agencies.

Staff

The four full-time staff members include the director, resident manager, cook, and assistant cook. Five volunteers provide clerical help 10 hours a week, pastoral counseling, and Bible study; and a psychologist from the nearby hospital holds a group meeting one evening a week.

Board of Directors

Pathway has a nonvoting advisory board which includes a state legislator, a Congressman, and the quarterback of a professional football team. Throughout the year policy decisions are made by the 15-member board of directors. The executive board of six includes the officers of the board (president, vice president, secretary, treasurer), the house director, and the personnel committee chairman. The other officers, except the president, also chair committees.

Budget

Pathway house operates almost entirely on the income from resident fees. Actual income last year totaled $25,386.11. Donations amounted to $250.

Learning Activity Handout 3—Board/Director Problem Sheet

Participants

a. Rev. Marvin Turner — president; director of Blairville Council of Churches

b. Louis Haber — vice president; lawyer and lay leader of Blairville Methodist Church

c. John J. O'Hara, S.J. — secretary; associate pastor of St. Ignatius Church

d. Roberta Stevens — treasurer; vice president of Blairville Savings & Trust

e. Geraldine Stone — chairperson, personnel committee; director of Christian education at the Blairville Presbyterian Church

f. Jack Simon — board member; director of Pathway residence

Problem

A special meeting of the executive board has been called to consider the matter of locating supplemental funds to pay for building repair and renovation. A recent building inspection uncovered these violations: leaking roof, peeling plaster in 13 rooms, inadequate wiring throughout, substandard bathroom fixtures, and a faulty heating unit. One estimate already received for these repairs is $16,680.

The purpose of the meeting is to develop a plan to obtain the funds which will be submitted to the full board for approval. Reverend Turner, board president, is chairing the meeting.

Learning Activity Handout 4a—Instructions for Role Players

1. Participants should not look at each other's roles.
2. Each person should read his or her part carefully and play the role conscientiously.
3. Put yourself in the role that you are given.
4. Participants should not overact.
5. Be natural, but emphasize behavior aimed at fulfilling your role.
6. Just before the session begins, introduce yourself to the whole group by the name of the role you are playing. Other role players will do the same.

Role Description

You are Rev. Marvin Turner, president of the board of directors and director of the Blairville Council of Churches. You were a member of the founding board and want to preserve the status quo. You also like your position as presiding officer.

Learning Activity Handout 4b—Instructions for Role Players

1. Participants should not look at each other's roles.
2. Each person should read his or her part carefully and play the role conscientiously.
3. Put yourself in the role that you are given.
4. Participants should not overact.
5. Be natural, but emphasize behavior aimed at fulfilling your role.
6. Just before the session begins, introduce yourself to the whole group by the name of the role you are playing. Other role players will do the same.

Role Description

You are Louis Haber, vice president of the board, a lawyer and an influential lay leader in the Blairville Methodist Church. It is your view that "God helps those who help themselves," and therefore you are lukewarm to the idea of seeking outside help for money. Also you think that the director, Jack Simon, should bear the major responsibility for solving financial problems.

Learning Activity Handout 4c—Instructions for Role Players

1. Participants should not look at each other's roles.
2. Each person should read his or her part carefully and play the role conscientiously.
3. Put yourself in the role that you are given.
4. Participants should not overact.
5. Be natural, but emphasize behavior aimed at fulfilling your role.
6. Just before the session begins, introduce yourself to the whole group by the name of the role you are playing. Other role players will do the same.

Role Description

You are John J. O'Hara, S.J., secretary of the board and associate pastor of St. Ignatius Church. You are an experienced administrator as well as an activist and a strong believer in mobilizing the community to meet a crisis. Moreover, it is your opinion that you would be more effective as board president than Reverend Turner.

Learning Activity Handout 4d—Instructions for Role Players

1. Participants should not look at each other's roles.
2. Each person should read his or her part carefully and play the role conscientiously.
3. Put yourself in the role that you are given.
4. Participants should not overact.
5. Be natural, but emphasize behavior aimed at fulfilling your role.
6. Just before the session begins, introduce yourself to the whole group by the name of the role you are playing. Other role players will do the same.

Role Description

You are Roberta Stevens, treasurer of the board and vice president of the Blairville Savings & Trust. You have recently joined the executive board and do not know too much about alcohol problems, but you are extremely interested and have good management ideas. Also your experience in business has taught you the value of systematic planning.

Learning Activity Handout 4e—Instructions for Role Players

1. Participants should not look at each other's roles.
2. Each person should read his or her part carefully and play the role conscientiously.
3. Put yourself in the role that you are given.
4. Participants should not overact.
5. Be natural, but emphasize behavior aimed at fulfilling your role.
6. Just before the session begins, introduce yourself to the whole group by the name of the role you are playing. Other role players will do the same.

Role Description

You are Geraldine Stone, chairman of the personnel committee and director of Christian education of the Blairville Presbyterian Church. You were a member of the founding board. Your solution to the current funding problem is to organize a volunteer committee to make the repairs and do the redecorating. Generally you follow the lead of the board president, Reverend Turner.

Learning Activity Handout 4f—Instructions for Role Players

1. Participants should not look at each other's roles.
2. Each person should read his or her part carefully and play the role conscientiously.
3. Put yourself in the role that you are given.
4. Participants should not overact.
5. Be natural, but emphasize behavior aimed at fulfilling your role.
6. Just before the session begins, introduce yourself to the whole group by the name of the role you are playing. Other role players will do the same.

Role Description

You are Jack Simon, board member and director of Pathway Residence. You assumed that position 2 years ago, and through hard work and ingenuity have made substantial improvements in the program. You see this planning effort as the first step toward getting the board to do some long-range planning to meet future needs such as salary increases for staff, improvements to meet accreditation standards, etc.

Learning Activity Handout 5—Guide for Role-Player Observers

1. You will observe ____________________ who is playing the role of ______________________________.
2. Be sure you are seated where you can see this person clearly.
3. In your observation, look for answers to the following questions:
   a. Was his or her participation general, specific, or lopsided?

   b. What effect did his or her participation have on the group?

   c. Did his or her contributions indicate that he or she was listening to others in the group?

   d. Were his or her contributions centered on solving the group's problems or were they directed by personal needs, aspirations, attitudes, and values?

Group Process Observation Sheet

1. What group functions did you notice?
(check categories that apply, as often as you notice them)

Task functions	Maintenance functions
______ Initiating	______ Encouraging
______ Information or opinion seeking	______ Harmonizing
______ Information or opinion giving	______ Compromising
______ Clarifying or elaborating	______ Gatekeeping
	______ Standard setting

2. What actions were present which obstructed group effectiveness?
(check as many times as it is noticed)

______ Blocking

______ Recognition seeking

______ Dominating

______ Avoiding

3. What characteristics of effective groups did you notice?
(check as many as apply to the group you observed)

______ Participation evenly divided

______ Participation contributed to the work of the group

______ Organization appropriate to the task

______ Constructive atmosphere

______ Open communication of ideas and feelings

______ Decisions made by consensus on important points

______ Intended results accomplished

Comments: ____

____

Learning Activity Handout 7—Hidden Agenda Information Sheet

Introduction

The purpose of this skill was to demonstrate that "what went on underneath the table" interfered in a rather dramatic fashion with what was going on above. In other words, the participants' needs, which influence their aspirations, attitudes, and values, affect the way they react to the surface task.

What to do About Hidden Agenda

1. Remember that the group is continuously working on two levels at once: the surface level and the hidden agenda level. Consequently, the group may not move as fast on the surface as the participants might expect.
2. Look for the hidden agenda that are present. Recognition is a first step in a diagnosis of group difficulty.
3. Sometimes a participant can make it easier for a group to bring its hidden agenda to the surface. The participant may say, for example, "I wonder if we have said all that we feel about the issue. Maybe we should take time to go around the table so that any further thoughts can be opened up."
4. Some hidden agenda can be presented and talked about and should then become easier to handle. But many hidden agenda would hurt the group more if they were talked about openly. Group participants need to be sensitive to the possible dangers and should try to recognize what a group can and cannot face at a given point.
5. Do not scold or pressure the group when hidden agenda are recognized. They are present and legitimate and must be worked on in much the same manner as the surface task. At different times, hidden agenda should be given different amounts of attention, depending upon their influence on the surface task and the nature of the group and its participants.
6. Help the group find methods of solving hidden agendas as they would handle surface agenda. Although the techniques may vary, problem-solving methods are needed for handling hidden agenda.
7. Spend some time evaluating progress in the group's handling of hidden agenda. Each experience should indicate better ways of handling agenda more openly. As groups mature, hidden agenda are reduced. Evaluation sessions in the last 15 minutes of a meeting can profit a group immensely.

In our discussion of the previous exercise we have seen that an individual's behavior in a group situation is neither random nor accidental. People behave according to personal motivation--what we might call needs. Those needs may be social or emotional. They may be explicit in the group or hidden as in the skill exercise. They may be known to the individual or unknown to him or her.

If a person's behavior is not random or haphazard but rather is need-determined, then the very act of joining a group must be the expression of personal needs.

We all have needs. They can take different forms and can be satisfied in different ways. According to psychologist Abraham Maslow, the sum total of an individual's needs is arranged in a hierarchy, with physical needs and the need for security at the base of the order. Physical needs (e.g., food, shelter, warmth) are those which must be satisfied in order to maintain life. Needs for security must be fulfilled if the organism is to function within his environment. For example, if the individual is not to be overwhelmed by feelings of anxiety, there must be a degree of stability and consistency within the environment.

When the basic survival needs are met and when there is contact with society, other needs may press for satisfaction. These are the social, ego, and self-fulfillment needs which can be optimally satisfied in a group situation. Social needs become evident as individuals seek acceptance from others. With the fulfillment of social needs, ego needs press for satisfaction. And it is only as the individuals find answers to the mystery of their own unique identity that they can then begin to be all that they are capable of being.

Group participation, then, is motivated primarily by certain needs for which individuals seek fulfillment, expression, and satisfaction. People join groups, therefore, in search of something—something personal and important for their own senses of well-being and comfort. While individuals share certain common human needs, the fulfillment of these needs is sought in unique ways. The individual's needs for feelings of belonging, acceptance, recognition, self-worth, self-expression, and productivity are evident among those needs that motivate desires for group life.

While individuals become group participants because they have certain needs for which they seek either expression or fulfillment, and while these needs are personal and subjective, they are not necessarily "selfish." It is both "normal" and "natural" for the individual to bring to the group desires for the satisfaction of personal needs. What we are concerned with is not whether these needs should be satisfied, but rather with the consequences of their expression for others and for the group as a whole. What we want to question is whether the fulfillment of one individual's need blocks other individuals and the group from achieving their goals. If this is, in fact, found to be the case, we will then want to help the individual to express his or her needs in ways which are helpful for and congruent with the needs of the other group participants and with the goals of the group.

Content Choice
(for flip chart 1)

"Participants will be able to recognize an alcoholic person in a clinical setting."

"Participants will be able to develop complete sociograms on alcoholic clients."

"Participants will be able to transport alcoholic clients by ambulance from Main Street to Smith County Hospital in no more than 7 minutes."

Content Validation Guide

WHO IS THE EXPERT?

Am I the expert?	Are the trainees the experts?	Are films, tapes, or articles the experts?	Is someone else the expert?
Do I know the content? Can I learn the content?	Do they already have the information they need? How do they need to look at it differently?	Can I find the information I want in these media? Are they the most effective ways of transmitting the content?	Can someone else tell me and my trainees what we need to know?

Evaluation Guide

(100 Points)	**Organization Need Analysis**
25	States what the agency is organized to do.
25	States how the agency will know when it has achieved its goals.
25	States what tasks and jobs are required to achieve the goals.
25	States how necessary is target job (skill area) for achieving the goals.
(100 Points)	**Job Analysis**
50	Contains a detailed list of behavioral tasks which are necessary and essential for the job to fulfill its function.
50	Contains a described minimum level of performance for each task.
(100 Points)	**Performance Analysis**
25	Contains a questionnaire to determine level of competency.
25	Contains an interview plan; i.e., key interview questions and a schedule of interviews (both individual and group).
25	Contains a diagnostic test.
25	Contains a list and description of skill deficiencies.
(200 Points)	**Training Group Analysis**
25	States common learning need in knowledge area.
25	States common learning need in skill area.
25	States common learning need in attitude area.
25	Describes a process for determining each trainee's readiness to learn.
25	States rationale for heterogeneous, homogeneous mix of personal resources and traits.
25	Contains a profile of the social, cultural, personal characteristics of the group.
25	Lists selection criteria.
25	Contains a plan for applying selection criteria.

(150 Points)	**Learning Outcomes**
50	Goals for the 2-day training event are clearly stated; i.e., they describe in broad terms what the trainees should be able to do after the event has concluded.
25	Objectives for the 2-day event, as a whole, are included and can be related to specific learning activities.
25	Each learning activity contains one or more clearly stated objectives which describe an **observable behavior.**
25	In addition to observable behavior each objective clearly describes an **accepted standard of achievement.**
25	In addition to observable behavior and accepted standard of achievement, each objective clearly describes the **conditions under which the observable behavior is to take place.**
(250 Points)	**Curriculum Building Rating Sheet**
10	Contains a visual representation of the content flow and sequence of learning activities.
10	Contains an hour-by-hour schedule detailing start and finish times, breaks, etc.
10	Contains an outline for each learning activity to be used in the 2-day event.
20	Contains a variety of learning methods and techniques.
25	Selection of specific learning activities are clearly appropriate for achieving the stated objectives.
25	Taken as a whole, the selection and sequencing of the learning activities fulfill the trainee's need to be self-directed.
25	The learning activities are designed to accommodate the problem-centered interest of adult learners.
25	Each learning activity provides the trainees with an occasion to top their personal experiences in relating the subject matter.
50	Specifically states the role of each facilitator and resource person to be used.
50	Contains a list of logistical arrangements that must be carried out in advance of the training event.

(150 Points)		One learning activity contains the following items:
10	1.	Statement of goals and objectives for this specific activity.
10	2.	Clear statement of linkage with the previous activity.
10	3.	An activity to test the trainee's understanding of the goals of the exercise.
10	4.	Verification of content validity; i.e., an identification of the expert source for content or a justification for the use of expert resources.
10	5.	Comfortable variety of techniques.
10	6.	Major points summary for all lecture content.
10	7.	Adequate time required for each activity.
10	8.	Detailed listing of newsprint illustrations.
10	9.	List of major discussion points.
10	10.	Written statement for all group tasks.
10	11.	A review activity and concluding remarks.
10	12.	List of equipment required for presentation.
10	13.	Copies of all materials to be distributed.
10	14.	Identification of primary methods to be used.
10	15.	Description of room arrangements.

(200 Points)	Evaluation
50	Contains a statement of goals for evaluating the total training event.
25	Contains copies of evaluation instruments.
25	Identifies a monitor/evaluator and describes the role.
25	Contains a distribution plan for the report of the evaluation.
25	Identifies followup activities needed to support newly learned skills.
25	Evidence of feedback and two-way communication designed into each learning activity.
25	Evidence of continual comparison of training objectives to organization goals.

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Resource Group Assignments

(for handout 1)

Resource Group 1:

Share an especially good example of organization need analysis and of job and performance analysis.

Resource Group 2:

Share an especially good example of training group analysis and of a statement of learning outcomes.

Resource Group 3:

Share an especially good example of curriculum building.

Resource Group 4:

Share an especially good example of evaluation and feedback.

Delivery Task Options

I. Organization

A. Individual

Note: If all participants choose individual presentations, two audience/review groups will be formed.

B. Group

Note: Groups limited to three persons.

II. Content

A. Deliver a 20-minute segment of an exercise written up in the design task.

For example: demonstrate one objective or one activity.

B. Demonstrate a particular technique.

For example: process a role play or
improve a particular presentation skill.

III. Factors

A. A 20-minute group feedback session must be planned to follow each presentation. This session must be structured and have its goals established.

B. Each presenter must select in advance a team of two special evaluators for in-depth feedback and assistance in critique of the videotape.

C. All presentations will be video taped and viewing time scheduled.

D. Four and one-half hours of preparation time will be available during scheduled training hours.

Presentation Evaluation Form

TRAINER

Rate the trainer's overall performance with regard to the following characteristics on a scale of 1-5, where:

1 = Poor, 2 = Below Average, 3 = Average, 4 = Above Average, 5 = Excellent

A. Preparedness. How prepared do you think the facilitator was to conduct this session?	1	2	3	4	5
B. Personal delivery style. How well was the facilitator able to communicate this information to your group?					
(1) Vocabulary	1	2	3	4	5
(2) Clarity of expression	1	2	3	4	5
(3) Pacing, pausing, emphasis	1	2	3	4	5
(4) Voice projection	1	2	3	4	5
(5) Gesturing	1	2	3	4	5
(6) Logical development	1	2	3	4	5
(7) Adequacy of illustration examples	1	2	3	4	5
(8) Appropriateness of humor	1	2	3	4	5
(9) Pronunciation	1	2	3	4	5
(10) Enunciation	1	2	3	4	5
(11) Enthusiasm	1	2	3	4	5
C. Group skills. How well was the facilitator able to lead the group and moderate the discussion?					
(1) Sensitivity/perception of group dynamics. How well did the facilitator sense and respond to group needs and reactions?	1	2	3	4	5
(2) Nonjudgmental attitude	1	2	3	4	5
(3) Participation encouragement	1	2	3	4	5
(4) Appropriate interventions	1	2	3	4	5
(5) Keeping group ontrack, on topic, moving along	1	2	3	4	5
(6) Initiation and summarization of discussion	1	2	3	4	5

D. **Psychological learning climate.**

(1) **Host Role.** How well did the facilitator make people feel welcome and comfortable?	1	2	3	4	5
(2) **Trust Level.** Was the degree of trust appropriate to learners' goals and objectives?	1	2	3	4	5
(3) **Session Control.** How well was the facilitator able to stay on top of what was happening?	1	2	3	4	5

LEARNER

Rate the group reaction with regard to the following characteristics on a scale of 1–5, where:

1 = Poor, 2 = Below Average, 3 = Average, 4 = Above Average, 5 = Excellent

A. Receptivity to content	1	2	3	4	5
B. Receptivity to method	1	2	3	4	5
C. Receptivity to facilitator	1	2	3	4	5
D. Participation in group methodology/ group interaction	1	2	3	4	5
E. Responsiveness to facilitator directions	1	2	3	4	5
F. Overall group reaction	1	2	3	4	5

G. Did the group appear to be overly dominated by:

_______ facilitator _______ one participant

_______ a few participants _______ none of these

METHODOLOGY

Rate the session methodology itself with regard to the following characteristics on a scale of 1-5, where:

1 = Poor, 2 = Below Average, 3 = Average, 4 = Above Average, 5 = Excellent

A.	**Appropriateness to content.** How well do you think the method(s) (group discussion, games, role plays, etc.) used in this session helped the group to understand the content?		1	2	3	4	5
B.	**Appropriateness for group.** How well do you think the methods used in this session matched the capability and interest of the group?		1	2	3	4	5
C.	**Feasibility for facilitator.** How well do you think the methods used in this session matched the capability of the facilitator?		1	2	3	4	5
D.	**General group interest.** Regardless of how well the methods were carried out, how would you rate the methods used in this session in capturing the interest of the group?		1	2	3	4	5
E.	**Content validation.** Was the validity of the content established by the trainer?		1	2	3	4	5
F.	**Media.** (visuals, movies, slide-tapes, handouts, etc.):						
	(1)	Appropriateness to content	1	2	3	4	5
	(2)	Appropriateness for group	1	2	3	4	5
	(3)	General group interest	1	2	3	4	5
	(4)	Facilitator comfort with equipment	1	2	3	4	5

ENVIRONMENT

Rate the environment in which the session was held on the following characteristics on a scale of 1-5, where:

1 = Poor, 2 = Below Average, 3 = Average, 4 = Above Average, 5 = Excellent

A.	Advance preparation	1	2	3	4	5
B.	Room temperature	1	2	3	4	5
C.	Room size	1	2	3	4	5
D.	Furniture arrangement	1	2	3	4	5
E.	General physical comfort	1	2	3	4	5
F.	Materials	1	2	3	4	5
G.	Lighting	1	2	3	4	5

Delivery Task Week Flow

(for flipchart 1)

TRAINER

a) Two content sessions:
   1. Feedback I and II
   2. Small group skills

b) Delivery Laboratory:
   1. Technical skills of delivery
   2. Technical skills of monitoring

ENVIRONMENT

a) Two content sessions:
   1. Physical learning climate
   2. Psychological learning climate

b) Delivery Laboratory:
   1. Technical skills of staging
   2. Relationship of method to training room

NCAE Conference Form 1
CONFERENCE FACILITIES REQUEST FORM

Conference Number: ____________

Group: ____________

Address: ____________ Name of Contact: ____________

____________ Tel. No.: ( ) ____________

Number of Participants: ______ Number of Meeting Rooms Needed: ______

Conference Dates: Start ___/___/___ End ___/___/___

WRITE ALL ADDITIONAL DETAILED INFORMATION ON REVERSE SIDE.

DATE(S):	Month / Day / Year	TIME:		Number of Rooms Needed
Day 1	/ /	From:	To:	
Day 2	/ /	From:	To:	
Day 3	/ /	From:	To:	
Day 4	/ /	From:	To:	
Day 5	/ /	From:	To:	

HOTEL NEEDS:

(Please submit participant name and address list and individual arrival and departure information as soon as available.)

Number of single rooms: ____________ Double rooms: ____________

Arrival date: ____________ Time: ____________

Departure date: ____________ Time: ____________

TRANSPORTATION NEEDS:

(Additional details on back.)

	From	To	Date	Time(s)	No. of passengers	Station Wagon	Bus
1.							
2.							
3.							
4.							
5.							

MEETING ROOM NEEDS:

(Additional details on back.)

	Room	No. of Occupants	Time	Type of Furniture Setup	**Audiovisual Equipment
DAY 1.	101				
	102				
	103				
	104				
Other:					
DAY 2.	101				
	102				
	103				
	104				
Other:					
DAY 3.	101				
	102				
	103				
	104				
Other:					
DAY 4.	101				
	102				
	103				
	104				
Other:					
DAY 5.	101				
	102				
	103				
	104				
Other:					

EQUIPMENT NEEDS:

	Item	Number Needed	In Room(s)	A-V Equipment Operator Needed in Room(s) (write in room number(s))
1.	Chalkboard			
2.	Flipchart easel and pad			
3.	Note pads, pens, or pencils			
4.	35-mm slide projector			
5.	Opaque projector			
6.	Overhead projector			
7.	TV camera			
8.	Video tape recorder			
9.	16-mm film projector			
10.	Audio tape recorder			
11.	Microphone			
12.	P.A. system			
13.	Other:			
14.	Other:			
15.	Other:			

FOOD NEEDS:

(Please attach detailed schedules and information as to menu preferences and types of service.)

BE SURE TO INCLUDE THE FOLLOWING INFORMATION:

1. Date
2. Time (and duration)
3. Location
4. Number of participants
5. Type of function (coffee break, luncheon, buffet, dinner, cocktails, etc.)
6. Menu preferences (hot, cold, kinds of foods, menu)
7. Kind of service (buffet, table service, bar, etc.)

CONFERENCE PERSONNEL NEEDS:

	Date(s)	Time(s)
Receptionist:	________	________
Other: ________________	________	________
Other: ________________	________	________

[ONLY APPLICABLE TO NCAE-SPONSORED CONFERENCES]

FINANCIAL NEEDS (ESTIMATED):

PER DIEM

1. Participant/Trainee per diem $ ______ /day

   Number of days per diem ______

   Total anticipated per diem $ ______ /Participant/Trainee

2. Conferee per diem $ ______ /day

   Number of days per diem ______

   Total anticipated per diem $ ______ /Conferee

3. Consultant/Trainer per diem $ ______ /day

   Number of days per diem ______

   Total anticipated per diem $ ______ /Consultant/Trainer

HONORARIUM/FEE

1. Conferee honorarium $ ______ /day

   Total anticipated honorarium $ ______ /Conferee

2. Consultant/Trainer fee $ ______ /day

   Total anticipated fee $ ______ /Consultant/Trainer

FINANCIAL VOUCHERING EXPLANATION TO CONFERENCE

Date and time for financial vouchering explanation and completion of forms during conference:

________________ ________________
Date Time

NCAE Conference Form 2
CONFERENCE TASK ANALYSIS

I. Determine Conference Dates
II. Mail Logistics Packets
III. Hotel and Airline Reservations
IV. Inventory
V. Conference Packets
VI. Plan Check and Review
VII. Site Preparation/Food and Meal Functions
VIII. Financial
IX. Conference Support
X. Postconference

I. Determine Conference Dates and Number of Participants

A. Receive conference facilities request form

B. Discuss conference facilities request form with conference manager
- General meeting room needs
- General hotel needs
- General food needs
- General transportation needs

C. Reserve conference space

D. Reserve hotel rooms

E. Review invitation letter

II. Mail Logistics Packets

A. Draft logistics packet
- Letter
- Logistics information
- Lodging/travel form and envelope
- Itemized expense statement instructions
- Marriott Hotel brochure

B. Conference manager's review and approval

C. Type labels

D. Type final copy

E. Xerox packets

F. Stuff and mail packets

III. Hotel and Airline Reservations

A. Record and file lodging/travel forms

B. Make final hotel/airline reservations

C. Mail travel information to participants

D. Acknowledge changes

IV. Inventory Conference Supplies

- Carrying cases
- Note pads
- Pens
- Binders
  - Small
  - Medium
  - Large
- "Where It's At. . ."
- Visitors' Bureau brochures
- Name badges
  - Holders
  - Inserts
- Dymo label tape (brown)
- Diplomas and folders
- Index-tabs (for binders)
- Three-hole lined paper
- Three-hole Xerox paper
- Large mailing envelopes (for logistics packets)
- Masking tape
- Markers
- Easel pads
- Chalk
- Napkins
  - Cocktail
  - Dinner
- Plates
  - Dinner
  - Snack
  - Bowls
- Glasses
  - Sherry (5 oz.)
  - Drink (6 or 7 oz.)
  - Water (8 oz.)
- Coffee
- Sugar
- Cream
- Tea
- Cocoa
- Stirrers
- Soda
- Liquor
- Juices

Conference Packets

A. Prepare labels (2) by participant name

B. Prepare name badges for participants and staff

C. Prepare table nameplates for participants and staff

D. Attach labels to carrying cases and binders

E. Stuff packets

- Pad
- Pen
- "Where It's At. . ."
- Etc.

F. Deliver to administrative assistant in charge of conference

Plan, Check, and Review

A. Generic work program and facilities request form

B. Generic work program and facilities request form

C. Generic work program and facilities request form

D. Generic work program and facilities request form

Site Preparation/Food and Meal Functions

A. Detailed followup discussion to I.B above

- Specific meeting room and furniture needs
- Specific equipment needs (includes receptionist's typewriter)
- Specific meal and food needs
- Specific personnel needs (conference receptionist, additional driver/assist(s))
- Specific transportation needs

B. Develop work plan for period of conference for assistant(s)

C. Arrange for off-hour air-conditioning and building access

D. Arrange meeting rooms

- See conference checklist
- Conference manager's review and approval

E. Fill equipment needs

- Requisition or rental

F. Arrange food/meal needs

- Hospitality suite (see conference checklist)
- Donuts/snacks
- In-house meal functions (see conference checklist)
- Arrange menu with conference manager
- Arrange with caterer
- Restaurant meals

  Arrange with restaurant

  Arrange menu with conference manager

  Prepare custom menu

  Arrange for payment

  Menu to restaurant

G. Arrange for Additional Personnel

- Receptionist

  Phone lists

  Receptionist instructions

  Driver/Assistant

H. Arrange for local participant transportation

- Hotel/NCAE/Hotel
- NCAE/Restaurant/Hotel
- Etc.

VIII. Financial

A. Estimate and request advance to cover conference's incidental cost

B. Prepare itemized expense statement for each participant and consultant trainer

C. Process participants' itemized expense statements

D. Disburse expense checks to participants

E. Substantiate cash advance with receipts

F. Review and approve restaurant, hotel, and transportation bills

IX. **Conference Support**

A. Coordinate assistant(s)' activities

B. Hospitality suite (see conference checklist)

C. Meeting rooms (see conference checklist)

D. Meal functions (see conference checklist)

E. Lodging and transportation changes

F. Local transportation

G. Daily feedback and coordination

H. General support

X. **Postconference**

A. Get feedback from conference manager

CONFERENCE CHECKLIST

I. MEETING ROOMS

1. Furniture arrangement (sufficient table space, seating, neatness)
2. Ashtrays (clean and sufficient number)
3. Ice water/pitchers and glasses (sufficient number)
4. Pads and pencils (if requested—in place and pencils sharpened)
5. Audiovisual equipment (if requested)
   - A. Projection equipment (with power cables connected, stands, ready for use)
   - B. Recording equipment (audio and/or video, power cables connected, fresh tape, takeup reels, microphones, cameras, etc.)
   - C. Amplifying equipment (mike(s) on table, floor, lavalier, etc.)
   - D. Chalkboard(s) and/or easel(s) w/fresh pads
   - E. Chalk, erasers, Magic Markers, pointer
   - F. Podium
6. Nameplates in place (if requested)
7. Name badges in place (if requested)
8. Trainee packets and/or materials in place (if requested)
9. Coffee and/or food (if requested—tea, cocoa, sugar, cream, stirrers, cups)
10. Lights and ventilation (check for blown-out bulbs)
11. General neatness of room and exactness of placement of materials, equipment, and supplies

IMMEDIATE (WITHIN REASON) POSTMEETING CLEANUP

II. MEAL FUNCTIONS

1. Time (anticipate and check delivery time)
2. Dining furniture (sufficient number and placement)
3. Buffet furniture (not blocking traffic)
4. Basic food/menu (check delivery—salt, pepper, butter, cream, sugar, serving utensils, etc.)
5. Additional food
   - A. Soft drinks
   - B. Milk
   - C. Ice
   - D. Water
6. Supplies (when needed)
   - A. Napkins
   - B. Plates
   - C. Utensils
   - D. Cups
   - E. Glasses
   - F. Tablecloths
   - G. Ashtrays
7. "Leftover" containers and aluminum foil
8. Trash containers (logistically but inconspicuously placed)
9. Lights and ventilation
10. General neatness of room and exactness of placement of food, plates, utensils, etc.

IMMEDIATE (WITHIN REASON) POSTMEETING CLEANUP

III. HOSPITALITY SUITE

1. Drinks
   - A. Sherry
   - B. Dubonnet
   - C. Dry Vermouth
   - D. Scotch
   - E. Bourbon
   - F. Vodka
   - G. Gin
   - H. Seagram's Seven
   - I. Tonic water (quinine)
   - J. Club soda
   - K. Ginger ale
   - L. Seven-up
   - M. Cola
   - N. Orange juice (smaller cans)
   - O. Tomato juice (smaller cans)
   - P. Apple juice (small)
   - Q. Punch or fruit drink (quality)
2. Supplies
   - A. Plates
   - B. Napkins
   - C. Glasses
   - D. Utensils
   - E. Knives
   - F. Serving utensils (if needed)
   - G. Can opener
   - H. Corkscrew
   - I. Bottle opener
3. Snacks (as requested) (sufficient)
4. Individual invitations at hotel registration desk by 12 m. (2 p.m. latest—with correct room number and time)
5. Check announcement posted on lobby directory for correct room number and time
6. Room arranged by 3:30 p.m.
7. Room cleared as soon as possible or by 11:00 a.m. following day

A Physical Learning Climate Checklist

Space

Lighting

Acoustics/Outside Noise

Decor

Temperature

Ventilation

Seating Comfort/Position

Seating Arrangements/Grouping/Mobility/Rest/Change

Refreshment

Ashtrays

Restrooms

Audiovisual aids

Coatracks

Parking

Traffic Directions

Name Tags or Cards

Records/Addresses, etc.

Setting a Learning Climate

In addition to the physical environment in which people learn there is also a psychological environment that affects the freedom and openness individuals feel toward the learning. This is called the psychological learning climate and is one of the most important aspects of a training program. Setting the psychological learning climate is a tricky business for a variety of reasons:

- The beginning of training is the time people are most likely to be hostile toward and suspicious of the trainer, the training process, and the other trainees.
- Setting a learning climate requires great awareness and flexibility on the part of the trainer, who must assess where the group is and respond to its issues as they become evident.
- The process of setting the climate often entails what many trainees most resist and least admit—the need to break down the distance-making mechanisms, defenses, and masks between themselves and others.
- Setting the learning climate also entails what many trainers find most difficult—the need to stay patient and noncontrolling while the trainees surface their hostilities and suspicions and start to make their issues known.

If the proper learning climate is not set, the trainer will find his or her job much more difficult; perhaps even impossible. The most important time to set the learning climate, therefore, is at the beginning of the program. Successful trainers usually devote about 25 percent of their energies, both before training begins and during the program, to designing and creating the right learning climate. Such an effort is necessary because people cannot be forced to learn before they are ready. It is better to devote as much as 90 percent of the program to climate setting—if that is what the group needs—in order to get 10 percent good, productive learning out of the session, rather than push a great deal of content at learners who are not ready to receive any of it.

Generally speaking, a trainer can assume that a learning climate has been set for training when:

- the group demonstrates feelings of comfort that allow individual members to participate without anxiety or self-consciousness;
- there is a visible level of mutual trust, openness, and respect between participants and trainers;
- individuals in the group show that they are participating in the training program because they want to rather than because they have to or feel they should; and
- they can express confidence they will benefit from the training.

Different training situations require different degrees of openness—sensitivity training, for example, demands considerably more openness than does training in a manual skill. Trainers must be able to select the degree of openness that is appropriate for a group and they must be able to participate openly to the appropriate degree. When the atmosphere is too open, or if it is not open enough, the training will suffer from the resultant discomfort, anxiety, and mistrust. Setting a good learning climate depends upon the skill and sensitivity of the trainer.

The varying degrees of openness can be expressed on a continuum of levels from not open to completely open:

Not Open: Minimal trust, sharing, and honesty	Focused Openness	Completely Open: Maximum trust, sharing, and honesty
A B C	D	E
"Name, rank, and serial number"	"What do I do that is most likely and least likely to get the job done."	"Things I'd tell my analyst"

In level A the focus is on things: "our work" or "what we do in our region." At B more personal discussion arises: "my work" or "what I do." Increasingly personal but relatively safe areas are explored at C: "what I like or dislike in my work," while at D still more personal and more risky areas about feelings, such as "what I'm afraid of" or "what I think I do well or badly" are covered. Degrees of openness beyond D are not generally appropriate for task-oriented training groups but are useful in training for sensitive roles such as that of counselor.

A trainer should consciously decide where on the continuum the group should be to achieve the maximum learning, given the nature and goals of the training and the nature and background of the trainees. The degree of openness is in direct relationship to the goals of the training. Trainers may fail either by not having a sufficiently open atmosphere for participants to take reasonable learning risks or by having too open or semitherapeutic an atmosphere, thus interfering with task-oriented learning.

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The Openness Continuum

(for flipchart 1)

Not Open: Minimal trust, sharing, and honesty			Focused Openness	Completely open: Maximum trust, sharing, and honesty
A	B	C	D	E
"Name, rank, and serial number"			"What do I do that is most likely and least likely to get the job done."	"Things I'd tell my analyst"

Rules of Feedback

- It should be asked for by the recipient and remain under his or her control.
- It should be specific and refer to things, places, and events; not people.
- It should be directed toward behavior, events, or things that can be changed.
- It should relate to the current situation.
- In the training situation, it should be related to goals and objectives of training.

What to Observe in a Group

One way to learn in a conference is to observe and analyze what is happening in one's group. All of us have spent our lives in groups of various sorts—family, gang, team, work groups, etc.—but rarely have we taken the time to stop and observe what was going on in the group or why the members were behaving the way they were. One of our main goals here is to become better observers and better participants.

But what do we look for? What is there to see in a group?

I. Content versus Process

When we observe what the group is talking about, we are focusing on the content. When we try to observe how the group is handling its communication, i.e., who talks how much or who talks to whom, we are focusing on group process.

Most topics about the back-home situation emphasize the content: "What is good leadership?" "How can I motivate my subordinate" and "How can we make meetings more effective?" These topics concern issues which are there and then in the sense of being abstract, future, or past-oriented and not involving us directly. In focusing on group process, we are looking at what our group is doing in the here and now and how it is working in the sense of its present procedures and organization.

In fact, the content of the conversation is often the best clue to what process issue may be on people's minds when they find it difficult to confront the issue directly. For example:

Content	Process
1. Talking about problems of authority back home may mean...	that there is a leadership struggle going on in the group.
2. Talking about how bad group meetings usually are at the plant may mean...	that members are dissatisfied with the performance of their own group.
3. Talking about staff who do not really help anyone may mean . . .	dissatisfaction with the trainer's role in the group.

At a simpler level, looking at process really means focusing on what is going on in the group; trying to understand it in terms of other things that have gone on in the group.

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II. Communication

One of the easiest aspects of group process to observe is the pattern of communication:

1. Who talks? For how long? How often?
2. At whom do people look when they talk?
   a. other individuals, possible potential supporters
   b. the group
   c. no one
3. Who talks after whom, or who interrupts whom?
4. What style of communication is used (assertions, questions, tone of voice, gestures, etc.)?

The kinds of observations we make give us clues to other important things, such as who leads whom or who influences whom.

III. Decisionmaking Procedures

Whether or not we are aware of it, groups are making decisions all the time. Some decisions are made consciously and in reference to the major tasks at hand, while some are made without much awareness and in reference to group procedures or standards of operation. It is important to observe how decisions are made in a group, so the appropriateness of the decision and the consequences of given methods may be assessed in terms of what the group members really bargained for.

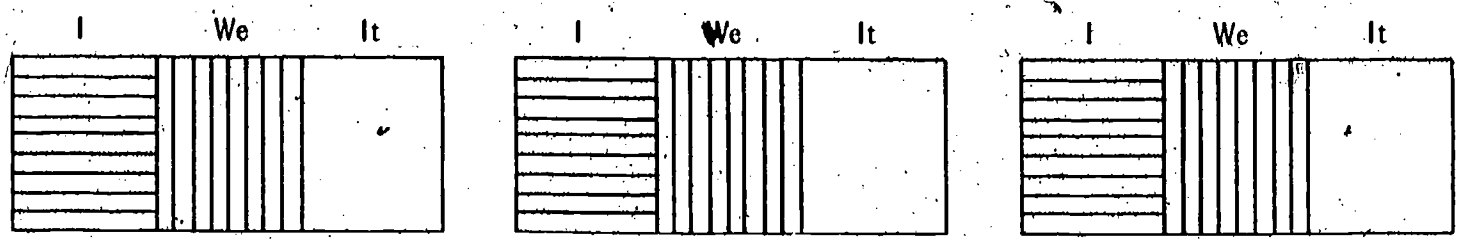
Group decisions are notoriously hard to undo. When someone says, "Well, we decided to do it, didn't we?" any budding opposition is quickly immobilized. We can only undo the decision if we reconstruct it, understand how we made it, and test whether this method was appropriate.

Some methods by which groups make decisions:

1. **The Plop:** "I think we should introduce ourselves." . . .silence.
2. **The Self-Authorized Agenda:** "I think we should introduce ourselves. My name is Joe Smith."
3. **The Handclasp:** "I wonder if it would be helpful if we introduced ourselves? I think it would. My name is Peter Jones."
4. **Questions:** "Does anyone object?" or "We all agree?"
5. **Majority-Minority Voting**

IV. Individual, Group, and Task Needs

In every ongoing group there are three types of needs to deal with at all times: **individual needs, group needs, and the task needs.** The length of time each type requires depends upon many variables, a major one being the age of the group. The following diagram shows different stages of an evolving group:



INFANCY ADOLESCENCE MATURITY

I = Personal Needs — getting each individual into the group, in spite of his or her hidden agendas.

We = Group Needs — developing useful membership roles, ground rules, procedures, and group structures as needs emerge.

It = Group Task — focusing on the agreed-upon objective(s).

The Situation

You are one of eight staff members of a poorly funded treatment agency. The staff includes:

- Director
- Administrator
- Social Worker
- Psychologist
- Counselors 1 and 2—nonalcoholic
- Counselors 3 and 4—recovering alcoholics

An unexpected windfall has come your way. A wealthy and grateful client has offered to pay for complete redecoration of the waiting room—money no object—providing you can get him or her a list of requirements by the end of the day.

The present waiting room measures 15' by 30', and has an entrance door from the street and one at the back which leads to the offices. It has two windows facing the street; the walls are painted light brown and the plaster is chipped; the floor is dark-red tile; there are 10 straight-backed wooden chairs in the room and a wooden table for the receptionist and her telephone.

The director has called the staff together for a 30-minute meeting to decide on requirements for redecoration.

Group Process Note Sheet

CONTENT	PROCESS
1. COMMUNICATION PATTERNS	
2. GROUP DECISIONMAKING	
3. GROUP NEEDS	

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Interventions

Task Interventions

- Clarify agreed-upon goal(s).
- Suggest division of labor for subtasks needed to complete job.
- Observe how much time is left, or if they did not budget their time, suggest they do.
- Play devil's advocate—needle them.
- Review critical issues and/or decisions they face.
- Identify resources that might be useful.
- Remind group members of why they need to complete their task; for example, to get an earlier break, or it's a needed action before the next step can occur.
- Diagram or write out what has been spoken; this provides clarity and focus.
- Offer an analysis, summary, or clarification of material that has been covered so far.
- Others ______________________________

Climate Interventions

- Humor, aimed at easing tension and anxiety.
- Silence, aimed at building tension or encouraging group participation.
- Trainer self-disclosure. Describe the feeling you are having and the source of that feeling. If the timing is right, discuss briefly such issues as trainee feelings about authority: For example, "kill the leader," or "leader as parent."
- Show empathy for the verbal or nonverbal effect (climate) in a group.
- Ask open-ended questions for clarification: For example, "I'm confused—can anyone tell me what's going on?"
- Confront. Usually this is a direct, blunt report of something that is occurring which has not been openly recognized. Give data to back up any confrontation.
- Offer a story or analogy to illustrate a point. This type of intervention is usually very good or very bad. Keep it relevant and sharp!

Climate Interventions

- To intensify climate: Move from a question to an exercise.
- To cool down climate: Ignore challenging questions. Suggest a break.
- Change environment by adjusting thermostat, rearranging chairs, moving indoors/outdoors, etc.
- Others ______________________________

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Bypasses for Roadblockers

1. BULLDOZER: "It's got to go this way."
   Possible intervention: We've agreed to abide by majority rule.
2. MULE: "I won't let you!"
   Possible intervention: Are we ready for a recess?
3. RECOGNITION-SEEKER: "I need another stroke."
   Possible intervention: One stroke per meeting is our limit.
4. GROUP-SNATCHER: "If I'm funny enough they'll join me. I'll try clown antics and then a funny joke or ridicule."
   Possible intervention: I sense you're not happy with our group goal.
5. WINDY: "Now my 20th point is. . ."
   Possible intervention: Let's appoint a timekeeper to ring a bell after anyone has spoken more than 3 minutes.
6. DRIFTER: "Have you heard about. . .that reminds me of. . ."
   Possible intervention: Let's appoint a subject-keeper to ring a bell when we get off the subject.
7. MANIPULATOR: "I'll trick them into voting to have it my way."
   Possible intervention: I don't think you're giving us your real reason. Could we look at your proposal below the surface?
8. HELPLESS: "Someone do it for me -- I'm so dumb."
   Possible intervention: Why don't you just watch for awhile, until you gain confidence?
9. SELF-CONFESSOR: "I'm no good -- I'm always doing it wrong."
   Possible intervention: You may be right.
10. PARTISAN: "My side is the right side."
    Possible intervention: You may be left.

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