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# You Can Teach Others

*A Professional Approach to Training Volunteers*

IDA RUSH GEORGE

First Edition

**YOU CAN TEACH OTHERS:  
A Professional Approach To Training Volunteers**

**Sponsored by: The State of Alabama,  
Office of the Governor; Commission on Aging;  
Office of Voluntary Citizen Participation (AOVCP)**

**Partial funding for AOVCP's Training for Trainers program  
and this book provided by a grant from ACTION**

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**Alabama Office of Voluntary Citizen Participation (AOVCP)  
State of Alabama Commission on Aging  
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Montgomery, AL 36130**

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The Center For Creative Communities  
P. O. Box 900  
Santa Fe, New Mexico 87504

## *Foreword*

In 1983, the Alabama Office of Voluntary Citizen Participation (AOVCP) received fiscal support from ACTION and the State of Alabama Office of the Governor to include development and implementation of a Training for Trainers program for Alabama's volunteers and volunteer leaders. By Executive Order of the Governor in 1984, the State of Alabama Commission on Aging assumed administrative responsibility for the State Office on Volunteerism and undertook the continuation of the Training for Trainers program.

Under the direction of the Alabama Commission on Aging and Office of Voluntary Citizen Participation staff, Advisory and Training Councils, the author of this book developed the AOVCP Training for Trainers program "You Can Teach Others".

Under contract with AOVCP, Mrs. Ida Rush George, a private consultant and active member of the American Society for Training and Development (ASTD), researched and wrote this book. Volunteering for AOVCP, Mrs. George developed the training materials and conducted the pilot workshop, "You Can Teach Others" in Montgomery on May 9, 1985.

The State of Alabama Office of the Governor, Commission on Aging and Office of Voluntary Citizen Participation wish to thank the countless individuals and groups who had a part in making this book a reality. We especially thank Mrs. Ida Rush George for her undying commitment to quality work and to volunteerism.

It is our sincere desire that the AOVCP Training for Trainers program will help you to realize your true potential. . . .  
**YOU CAN TEACH OTHERS!**

## *Acknowledgments*

I would like to extend my warmest thanks to those who so willingly shared their philosophies and knowledge: Joanna Bosko, Margaret Carpenter, Fran Cleveland, Judy Guerry, Lisa Hammond, Cookie Knott, Jean Kovac, Liles Nickerson, Jim Noel, Jeanne Pasquariello, Rita Six, Erin Snowden, Rachel Warren, Marsha Weber, M. P. Wilkerson, and Tom Westmoreland. To the Landmarks Foundation board and staff, a most sincere thank-you for allowing me to use their training programs as examples. Particular thanks to Jim Loeb, Chairman of the Board, and to Joyce Hobbs, President. Also thanks to the supportive, knowledgeable staff: Genevieve White, Carole King, Charlie Burrell, and Faye Love.

For generous contributions of time, assistance, professional expertise, and encouragement, I offer my gratitude to two dear friends: Joan Loeb and Mary Ann Neeley. Joan provided much needed and much appreciated editorial assistance and advice. Mary Ann gave intellectual stimulation and moral support when days were darkest and the well was dry.

The staff and volunteers of the Alabama Office of Voluntary Citizen Participation (AOVCP) were always most helpful. The AOVCP had a need for a manual to aid in the development and implementation of a training for trainers program for volunteer groups in Alabama. This book is an outgrowth of their need.

Ida Rush George

## *Introduction*

Once upon a time, there was a beautiful, magical country blessed with abundant natural resources. In this magical country, the rivers flowed with sparkling water; the plants bore magnificent golden fruit; and brightly colored birds sang melodiously at dawn and at dusk. In addition to all these wonders, this magical country had an even greater blessing: volunteers.

Volunteers sprang from every conceivable segment of the country's population. Some volunteers were big and some were small, but all were just right in size. Some were street-smart, and some were products of glistening ivory towers, but all were very, very capable. Some were from America, some from Europe, some from Africa, some from Australia, some from all the Easts—the near, middle, and far. Some were even from the northern most reaches, and some were from the southern most reaches of the earth. Some were very young—even in grade school, and some were older, but none was too old or too young.

All these volunteers had talents galore, and they were all experts in at least one area—if not more. Some loved to talk, and some loved to listen. Some could paint; some could hammer; and some could bake. Some could plan and organize, and some were natural leaders. Among their number were individuals with all manner of imaginable skills and talents. All could smile, and all wanted more than anything to improve the quality of life in their neighborhoods and communities. They were delighted at the prospect of using their talents to help their fellow man. Some could give many hours, and others a few, but each wanted to work and be a part of their volunteer organization. Each was a dedicated volunteer.

One volunteer organization in this magical country was swamped with volunteers. This had not always been the case. At one time the organization had been quite small, and

the volunteers had been few. This Golden Glow Organization had grown rapidly in a rather spontaneous fashion, and in the beginning everyone had done everything. At first all the jobs were simple, and the volunteer roster was very short. Without realizing it they had become a vital, strong organization with a volunteer roster which was so lengthy that the annual volunteer party could no longer be held in Sue's kitchen. Also without realizing how they had gotten there, they were suddenly in a quandary which threatened to become a quagmire. Trouble was afoot, and all was not well.

The leaders of this organization were concerned. They had had problems. Golden Glow appeared quite strong, and the annual report was a joy and wonder to behold. Nevertheless, the volunteers were growing restless. Everybody could no longer do everything, and by their trying to do everything, they were doing nothing. They were busy running around in circles, and they loved trying to do everything, but the organization was slowly spinning like a top that is losing its momentum. Aware that this wobbly movement was merely an illusion of progress and growth, a leader of the organization seized this moment to introduce a marvel of organizational development called job descriptions. These job descriptions were very effective, and now each volunteer and staff member knew exactly what to do—although they were often somewhat confused about how they were to do all these wonderful things their job descriptions required of them.

In answer to this confusion, another leader suggested that the organization needed to develop training programs. These training programs would help the volunteers and staff members learn how to do all the wonderful things listed on their job descriptions. Suddenly this became the hue and cry: "We need training programs!"

Everyone agreed that training programs were essential,

but here was the sticky part—no one knew how to develop, much less conduct, training programs. Oh yes, they knew that training programs began with a needs assessment and ended with evaluations. They even knew that something called learning objectives would be necessary. They had all heard that presentation skills were somehow a part of the trainer’s bag of tricks. All the volunteers and staff members had read or heard (the grapevines also flourished in this magical kingdom) that training was the answer to all sorts of problems. Not only would training prepare them to do their jobs; it would help them to grow and change as the organization grew and changed. They all knew what training was, what the components of training were, and what the benefits of training could be, but alas and alack, no one knew *how* to design, develop, or conduct training programs. Nor did they know *how* to conduct needs assessments, prepare training materials, or evaluate a training program.

Suddenly a splendid wizard appeared in their midst and said, “Listen carefully, and I shall tell you *how*. I shall tell you how to do all manner of marvelous things. If you are willing to work very hard and if you are truly concerned and want to help others, *you can teach others*. You must, however, be committed to hard work, and you must truly love other people. If, indeed, you can meet these two requirements, *you can teach others*. Now a little luck will be nice, and a dash of creativity won’t hurt. A bit of fun and a sense of humor will add spice. The path will not always be downhill, but the way is broad and clear. Miracles can happen, and you can, indeed, teach others.”

This guide does not promise miracles, but it also does not deny their possibility. Learning is most certainly a miracle, and good trainers can certainly help others to learn. Volunteers, paid staff members, agency administrators, and board members can all teach others. This book will tell you how.



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**Prerequisites  
for Successful  
Training  
Programs**

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*“What everyone wants from life is continuous and genuine happiness. Happiness is the rational understanding of life and the world.”*  
—Baruch Spinoza

**H**appiness, understanding, and growth are entwined. People who restrict their opportunities for learning become increasingly bored, disillusioned, and indifferent to the world around them. Their earthly existence becomes dull and dreary. On the other hand, if faced with situations requiring skills and knowledge which they do not possess, they become worried and anxious. The ideal mental state, the “happy” mind, is one that has achieved a delicate balance between the challenges it faces and the skill it possesses. This is not a destination one can hope to reach and never again leave. Rather, it is a goal which constantly moves slightly beyond one’s grasp. To be constantly challenged to learn new ideas, new skills, new attitudes is the ideal state. It is an ideal state for both individuals and volunteer organizations.

The question of responsibility looms before us. Who is responsible for developing and maintaining this ideal state—this delicate balance—between the challenges we face and the skill we possess? The question of responsibility is a double-edged sword. This responsibility is shared by both the organization (with the trainer as its representative) and the participants in the training program. The organization, the trainer, and the participants share the responsibility for happiness, understanding, and growth. None can afford to sit idly and passively, waiting for a miracle to happen. Miracles happen only when we undertake some responsibility for their happening. (This is not a denial of the miracle of learning; it is merely a statement of our responsibility in

making the miracle possible.) None can afford to sit and wait with meek passivity for learning to occur. The organization is responsible for planning and organizing the training programs; the trainer is responsible for designing, developing, and conducting successful training programs; and the participants are responsible for learning.

Much to do has been made over what one can and cannot teach and over who is responsible for learning. The arguments have been loud and vociferous. The ability to entrap with semantic skill has often overshadowed the truth of the situation. Patricia McLagan, a noted training professional, has clearly stated who is responsible for what:

“The trainer is responsible for correct needs and problem analyses, information finding, and organizing; for communicating the information clearly, correctly, and in a way that makes it important to the learner; for helping the learner to learn. The learner is responsible for analyzing his own needs, for setting goals, for customizing the learning to his own situation, and ultimately, for designing an application plan and using it.”

This clear statement of responsibility applies to any training program. In addition to this, we must examine the organization's responsibility for providing needed training programs.

## **The Organization's Responsibility**

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The volunteer organization assumes responsibility for the growth and development of the organization, its staff, and its volunteers. Although an organization may appear static, this is never the case. The amount of growth or decline may be so slight as to appear nonexistent, but any organization

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is either growing or declining. Training, education, and development programs are vital to any organization's growth. The volunteer organization is responsible for both planning and supervision of the organization's training, education, and development programs. In addition, the volunteer organization must provide training for those who conduct the organization's programs.

### **Definition of Training, Education, and Development**

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The terms *training*, *education*, and *development* are often used interchangeably. They have, however, rather specific meanings:

#### **Training**

Training improves one's job performance in the present job, in a job one has just been selected to perform, and in a job one is being promoted to perform.

#### **Education**

Education improves one's competence in areas beyond the present job and prepares the individual for increased or different responsibilities in the organization.

#### **Development**

Development prepares one to grow and change as the organization grows and changes. Development programs produce viable and flexible staff members and volunteers.

Effective organizations prepare their staff and volunteers for both the present and the future. They begin by providing orientation training and job training. This training enables both the organization and its workers to operate efficiently and effectively in the present. With education and development programs, organizations prepare for the future.

Education and development programs can diminish



the fear and anxiety caused by change. Organizations both desire and resist change. They are excited about the prospect of improvement, but they are fearful that the improvements might be a bit uncomfortable. Effective education and development programs will eliminate the negatives and accentuate the positives that accompany organizational growth and development. They will provide controlled change that will be in harmony with the organization's goals and objectives.

## ■ The Planning Process

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The planning process involves a logical, sequential approach. Both the organization and the trainer should understand the steps in the planning process. All planning is cyclical. There is no ending to the planning process. Once you take the first step, you begin a marvelous journey without end. There are, of course, stopping places and rest breaks and side trips, but the journey continues. The planning cycle involves the following steps:

### □ **Step One: List Goals.**

Goal-setting begins with a *written* statement of broad goals to be accomplished within a given unit of time. Goal-setting is generally divided into three time periods: long-term, mid-term, and short-term. The organization should undertake to establish long-term goals (five-year goals) to be achieved over a long period of time. Mid-term goals (three-year goals) will require a shorter time period to accomplish, and short-term goals (one-year goals) require an even shorter time period.

### □ **Step Two: Set Priorities.**

By each goal, designate its priority. Use an *A, B, C* system. Assign goals of great importance an *A*, goals of some importance a *B*, and goals of little importance a *C*. Next,

identify the *B* goals as either *A*'s or *C*'s. Plan to accomplish only the *A* goals.

□ **Step Three: Develop Statements of Activities.**

Activities are those logical steps that will lead to the accomplishment of the high priority goals.

□ **Step Four: Schedule Activities.**

Activities should be scheduled in the order they will occur for the accomplishment of the goal.

□ **Step Five: Assign Responsibilities and Establish Controls.**

Assign individuals responsibility for each activity, designate a time for the completion of the activity, and devise some method for supervising the accomplishment of each activity.

□ **Step Six: Remain Flexible.**

Review, amend, increase, or eliminate goals and activities whenever necessary. Plans, goals, and activities should always reflect any organizational, environmental, or competitive changes.

□ **Step Seven: Evaluate and Complete Activities and Goals.**

Designate specific times for the periodic evaluation, eventual completion, and final evaluation of all activities and goals.

□ **Step Eight: List New Goals.**

Start the process again at the end of the five, three, or one year cycle. All organizations should have five, three, and one year goals, and these goals should be reviewed on a monthly, quarterly, and annual basis.

To effectively plan for both organizational growth and for training, the organization should involve all its staff and volunteers in the planning process. Any organization that plans for future growth has taken a giant step toward achieving future growth.

## **Planning Steps for Successful Training Programs**

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Successful training programs do not spring up spontaneously. Neither do they appear as one stands by the window saying, “I wish we had a training program for all these new volunteers.” Instead, successful training programs require much planning and much preparation time. None of the planning steps is particularly arduous nor difficult, but they are very necessary. These are the steps an organization must take to develop successful training programs:

- Appoint a training program supervisor,
- Appoint trainers,
- Conduct needs assessments,
- Acquire basic materials,
- Develop the training program,
- Conduct the training program, and
- Evaluate the training program.

These steps, as the steps in the planning process itself, are cyclical. The first two steps, appointing a training program supervisor and appointing trainers, may or may not be completed each time, but the other steps must be completed in a cyclical fashion. Too many organizations make the mistake of developing training programs that are very much needed and very appropriate and continuing to run these same programs until they are not needed at all and are very inappropriate. No matter how much time and effort goes into the preparation of a training program, it must not outlive its usefulness. This would be an obvious exercise in futility. Following these planning steps for successful training programs will help your organization to present only needed programs.

## **Program Work Plan Forms**

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Program work plan forms are very useful tools. They allow for orderly development of a training program and for the execution of any organizational plan; they are a definite need. The program work plan form allows anyone to determine the status of any type of program; it is particularly useful for managers and supervisors.

A typical program work plan form contains the following information:

- Name of the program,
- Description of the task or activity,
- Indication of whether the task or activity has been completed,
- Names of individual(s) who are responsible for the task or activity,
- Completion date (indicated by day, week, month, or quarter), and
- Indication if the task or activity is an ongoing task or activity.

By looking at a program work plan form, anyone can see if the program is on schedule and if work is being done according to the plan. This allows a manager or supervisor to make needed adjustments and gives a much needed element of control.

## **The Training Program Supervisor**

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The training program supervisor may be either a paid staff member or a volunteer. The training program supervisor does not have to do all the tasks involved in developing and conducting training programs, but this person must see that all the work is done. This person may do *less* actual work than anyone else who is involved. If particularly vain, stubborn, or persnickety, this supervisor may do *all* the work.



If this happens, the training supervisor is obviously in need of training, and the organization must provide a supervisory development course to train the supervisor. The training program supervisor must, however, perform the following tasks:

- determine completion dates for each step in the development of the training program;
- assign responsibility for various tasks to volunteers, paid staff, agency administrators, or others;
- establish controls for checking on the progress each person or group is making;
- provide support; and
- remain flexible, for plans can change.

The training program supervisor should understand that the training programs will increase in effectiveness in direct proportion to the number of people who are actively involved in their development. Training program development requires much work and much time. The old proverb, "Many hands make light work," definitely applies to training program development.

## **Steps in Training Program Development**

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All training programs will require the following steps. If the participants are not all members of the same organization, there may be other considerations. These are the basic, sequential steps in training program development:

- Conduct the needs assessment,
- Analyze the needs assessment,
- Decide the order of training program development,
- Develop the training program,
  - Write the learning objectives,
  - Develop a training course outline,

- Select the training methods and materials,
- Write the lesson plan,
- Prepare the training materials,
- Select the participants,
- Locate and reserve a training room,
- Schedule the training,
- Notify the participants,
- Place chairs, tables, and equipment in the training room,
- Provide all equipment and materials,
- Conduct the training, and
- Evaluate the training.

These steps are less overwhelming if many people participate in the design and development of the training program. A well-prepared training program will also have a long life and require only a few changes as the jobs and organization change. A poorly prepared program will not even be worth the small amount of time it will take to complete. If you are going to make the effort, you should prepare the best programs your resources will allow.

The training program supervisor should plan to use volunteers, paid staff, agency administrators, clients, and community members as trainers. Using others as trainers expands the number of training programs and creates organizational and community support for training. Plan to conduct a You Can Teach Others workshop for the organization's trainers and help them to design their training programs. Help your trainers in every way you can, but leave the responsibility for training with them. Recognize and publicly acknowledge all your organization's trainers.

## **The Training Council**

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In addition to appointing a training program supervisor, the board of directors should appoint organization representatives

to a training council. This training council should consist of representatives from all sectors of the volunteer organization, and it should meet quarterly. Representatives of volunteers, paid staff, agency administrators, and clients will be vital communication links between the training program supervisor and the organization. The training council should assist in all aspects of the training program.

The training council's commitment to formal training programs will ensure the success of these programs. Their input will be invaluable, and they will help the training program supervisor to provide professional training programs for the organization. Training councils can provide both needed communication and support.

Successful training programs do not appear without planning and organization. With planning and organization, they will not only appear but also proliferate. As more and more people become involved with the planning and development of training programs, your organization will be able to move into education and development programs also. These programs will provide a sound base for organizational growth and development.

## **The Trainer's Responsibilities**

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Training is a line function. This sounds like a telephone problem doesn't it? This is management jargon for stating that supervisors, managers, or administrators are responsible for training anyone who reports to them. In other words, training should not be a staff function. There should not be a staff person who trains everyone in the organization.

Before you become alarmed, go back and look at the definitions of training, education, and development. Training prepares people to do their jobs. Anyone who supervises anyone should be capable of training those whom he or she supervises. This is one of the supervisor's major responsi-



bilities. If the supervisors in your organization cannot train those who report to them, they need to be trained as trainers. Your paid staff members and your volunteers should all be capable of training or teaching others to perform the tasks that they perform. It is the organization's responsibility to prepare them to teach others.

Education and development programs may or may not be conducted by the organization's paid staff members and volunteers. If competent, knowledgeable people are available, by all means use them for your education and development programs. If they are not available, you must go outside your organization to find trainers who can conduct the education and development programs you will need. Trainers are responsible for orientation, job instruction, and on-the-job training. It is quite possible that these paid staff members and volunteers may not only train those who work with them but also provide education and development programs for others in the organization. Any volunteer, staff member, consultant, or living, breathing body may conduct education and development programs for your organization.

The trainer's ultimate responsibility is to help people learn. Learning is a self-activity, but good teachers and trainers can make learning easier and more enjoyable. The trainer's job requires only two basic skills: the mastery of good two-way communication and the ability to build sound personal relationships. These skills are limited in number but comprehensive in scope. Natural candidates for the trainer's position will excel in establishing sound personal relationships, and they will be particularly adept at good two-way communication.

Most people hesitate to think of themselves as trainers, for they fear standing up and talking to a group of people. This is a foolish fear. Good trainers direct and control the communications process (whether training one person or many), but they allow others to do at least half of the talking. It is a mistake to view only those who have been born with

the “gift of gab” as the only ones qualified to be teachers or trainers. It is also a mistake to view good trainers as carbon copies of each other. Good trainers are first and foremost true to themselves. They are not carbon copies of anyone. They follow Shakespeare’s admonition:

“This above all: to thine own self be true,  
And it must follow, as night the day,  
Thou canst not then be false to any man.”

Good trainers compare themselves to no one but themselves. They can learn from others, and they can follow examples set by others, but they only succeed when they translate these lessons and examples into their terms. Good trainers are not parrots of anyone; they are themselves.

Anyone can become an excellent teacher or trainer. Trainers are made, not born. Many trainers fail, but not because of their natural abilities. They fail because they have not been properly taught how to teach others. They fail because they do not understand either the trainer’s role or the steps involved in designing and developing meaningful training programs. Anyone can be taught how to establish sound personal relationships, and anyone can be taught communication skills. Whether *anyone* wants to learn is indeed another matter. Likewise, anyone can understand the trainer’s role, and anyone can design and develop meaningful training programs. The choice is anyone’s. Anyone can teach others.

## **Prerequisites for Successful Training Programs Exercises**

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1. List the jobs performed by both volunteers and paid staff members in your organization.
2. Indicate which jobs have written job descriptions. Prepare needed job descriptions. Establish completion dates for needed job descriptions.

3. List the individual(s) who are responsible for training those who perform each job. Indicate if there is a written training program for each job.
4. Prepare needed training programs and train the trainers. Establish completion dates for program preparation and trainer training.
5. Assess the need for education and development programs. Prepare needed education and development programs. Establish completion dates for these programs.

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**Training Needs**

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*“There’s something that’s always bothered me about people saying ‘I was educated at’ or ‘I was trained at.’ There’s a terminal quality to that expression. What we really want is ongoing learning, because our needs are going to be ongoing and changing.”*  
—Marjorie W. Longley

**I**n developing training programs for your organization, the first and most important step is the needs assessment. Needs assessments should be an ongoing part of your organization’s planning process. Needs assessments, like the planning process, should be cyclical. You conduct the needs assessment, evaluate the needs assessment, plan training programs for the priority needs, evaluate the training programs, and repeat the process by conducting another needs assessment. Last year’s super training program may not be this year’s priority need. In fact, it might not even relate to this year’s need at all. Ongoing evaluation and assessment of needs are essential for the development of meaningful training programs.

The needs assessment should focus on the training needs of all: the volunteers, the paid staff, the agency administrators, the clients, and the community served by the organization. All training programs for the community should relate to the organization’s goals, objectives, and programs. An assessment of the community’s needs should center on the public’s need to know about the organization. Training programs for the community are most effective public relations tools. Training programs for the organization (for the volunteers, the paid staff, the agency administrators, and the clients) should relate to either the work performed or the services received by those who will be participants in the training program. An assessment of the organization’s

needs should relate to either the work, tasks performed, or services received. Needs assessments should focus on both the organization and the community, for no organization operates within a vacuum.

Self-assessment of needs by the people who actually perform each task or receive each service is most effective and accurate. Assessments that do not require individuals to sign their names will be most helpful. Equal involvement of volunteers, paid staff, agency administrators, clients, and the community will foster a feeling of unity, trust, responsibility, and support.

## **Forms of Needs Assessments**

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Needs assessments can take many forms. The most common types of needs assessments are the following:

- Performance tests;
- Reports from clients, paid staff, and volunteers;
- Exit interviews;
- Examination of organizational records;
- Formal research;
- Observation;
- Informal interviews;
- Formal interviews;
- Questionnaires; and
- Comments and questions.

These types of needs assessments have varying degrees of usefulness and accuracy. The performance test tends to intimidate those who are being tested. Reports from clients, paid staff, and volunteers may reflect only one person's views unless the assessment covers the entire group or unless it is conducted as a random sampling. Exit interviews may be biased depending upon the reason for the leavetaking, but nothing can be so brutally honest as a person who is moving halfway across the country with no intentions of ever

returning. Formal research involves observation, gathering data, evaluating the data, and drawing conclusions with all the dedication of a scientist. Interviews and questionnaires will be only as accurate and as useful as the questions they raise. Comments and questions may relate to needs that are no longer training needs or that never were. Each type of needs assessment will have its advantages and disadvantages, but some types of assessments are best suited to the volunteer organization.

## **Most Useful Needs Assessment Methods for Volunteer Organizations**

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The following types of needs assessments will be the most useful and easiest to administer:

### **Interviews**

Interviews may be either formal or informal. The interviewer may talk with any or all of the following: volunteers, paid staff, agency administrators, clients, and community members. These interviews may be scheduled or non-scheduled, highly structured or very casual. The interviewer may learn more at the water fountain than in the conference room. The interview may consist of many questions or one simple question: "What training programs do you think we need most?"

### **Observation**

The assessment may be a simple observation of the paid staff, agency administrators, volunteers, clients, or community to determine their training needs. Obviously, this will result in a subjective evaluation, and its worth will depend upon the experience and skill of the observer.

### **Questionnaire**

Questionnaires are the favorite form of needs assessments for most training professionals. They may be as simple or as

complex as the situation demands. Questionnaires may consist of open questions beginning with words such as *how*, *why*, and *when*. Open questions will allow individuals to analyze their needs without giving them hints of expected replies. A questionnaire may also consist of lists of proposed training topics to be ranked or selected. Good questionnaires will combine open questions with lists and require both objective and subjective responses.

#### **Records and Reports**

Records and reports provide objective data and may reveal problem areas such as excessive volunteer turnover or numerous complaints. The causes of these problems, however, may not be obvious, and the relationship of training to the problem may be nonexistent.

#### **Group Discussion**

A formal or informal discussion of training needs will be helpful if the discussion involves those who will receive the training. To combine questionnaires with group discussions would give the greatest involvement, and involvement always leads to support and enthusiasm for any project.

#### **Comments and Questions**

Unsolicited comments and questions from outside the organization may reveal training needs for both the organization and the community. Newspaper articles, letters to the editors, radio talk shows, and overheard remarks can often be most revealing.

Each type of needs assessment will require the ability to ask questions and analyze answers. The focus of the questions should relate to the organization's need for training, education, or development. The distinctive qualities of each term (training, education, and development) should help determine the scope of the questions. A training needs assessment will relate to current jobs and services; an educational needs assessment will relate to future jobs or services; and a developmental needs assessment will relate



to expanded or changed jobs and services. An assessment should only cover one need or carefully distinguish among the three areas of training, education, and development.

## ■ **Questions for the Needs Assessments**

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In developing questions for the needs assessment, consider both the work performed by your organization and the services received by your clients. All questions should relate to either current needs or future needs; these questions should center on tasks performed by individuals, services received by individuals, or the community's need for information about your organization. It is important that all training programs for the organization and community focus on the work currently performed by the organization. Education and development programs relate to the growth and development of both the individual and the organization; they will encompass subjects that extend beyond the present work of the organization. It is essential that the needs assessment questions fall into two distinct time frames: the current needs and future needs. Current needs will probably be training needs; future needs will be probably educational or developmental needs.

It is also essential to do whatever is necessary to avoid training programs which might be termed *eyewash*. Eyewash programs attract, amuse, and often blind the eye, but they fail to promote organizational strength or growth. They may be pleasant and colorful, but they do not strengthen or develop your organization. Meaningful training programs will relate to the work performed by the individual. Meaningful educational and developmental programs will relate to the future work of the individual or organization. Neither will be eyewash.

## Training Needs Assessment Questions

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The following questions will give you ideas of the types of questions that will help to determine organizational training needs:

- **Questions for Volunteers, Paid Staff, and Agency Administrators**
  1. What is your job?
  2. What tasks do you perform to accomplish your job?
  3. What problems are you experiencing in your job?
  4. How would training eliminate these problems?
  5. From a list of possible training topics, check the topics that interest you the most. Rank your top three choices.
- **Questions for Clients**
  1. What services do you receive from our organization?
  2. What problems are you experiencing?
  3. How would you know if these problems were solved?
- **Questions for the Community**
  1. Would you like to know more about our organization?
  2. What do you think of our organization's role in the community?
  3. How can we best inform the community of our organization's goals, objectives, and services?

Questions asked in the needs assessment may range from few to many, and they may be general or specific. They should, of course, provide enough data to give an objective view of training needs.

## Analyzing the Training Needs Assessment

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An analysis of the training needs assessment will identify

the problem areas. Further analysis will determine the problems that will require training as a solution. Training is not the magic elixir some think it to be. Many problems training can eliminate or ease; many problems training cannot eliminate or ease. To determine those problems training can solve will require a thorough analysis of the types of human-performance problems your organization is experiencing.

## Types of Performance Problems

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Many training publications and workshops emphasize the relationship of training to human-performance problems. Of the many who have written and developed workshops to explore this relationship, perhaps Geary Rummler and Thomas F. Gilbert are the most widely known. Together they did much to promote the concept termed “performance engineering” while working together at Praxis, a training company founded by them and later acquired by Kempner-Tregoe. Kempner-Tregoe conducts a Performance Analysis Workshop, an excellent training program for those who analyze and solve human-performance problems. This workshop defines human performance problems as either “deficiencies of knowledge” or “deficiencies of execution.” The problems caused by a deficiency in or lack of execution are *not* training problems. In other words, training is not a solution for these types of performance problems. The problems caused by a lack of knowledge are, however, training problems which may be solved by either training or job performance aids.

A *knowledge* problem is one which could not be solved by the performer even if his or her life depended on the solution. (This sounds extreme, but it certainly clarifies the analysis.) To solve these problems, you should provide the person with training or with job performance aids such as

do-it-yourself manuals, policy manuals, procedures manuals, checklists, or schematic diagrams.

An *execution* problem is one that could be performed satisfactorily if the performer's life depended upon it. The problem arises because the work is not being done satisfactorily. Knowledge is not the problem; execution is the problem. Performance problems that are execution problems require further analysis to determine their causes. These problems may be solved by improving feedback, by job engineering, or by changing the consequences of the performance.

## Possible Solutions for Execution Problems

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Most execution problems result from a lack of feedback, task interference, or negative consequences. The feedback problems may be remedied by the development of a feedback system; the task interference problems may be corrected by job engineering; and the negative consequences may be eliminated or replaced by positive consequences.

### **Feedback**

If the execution problem centers on job performance that is not meeting standards, job performance that has slowly deteriorated, or job performance that the performer views as unnecessary or unimportant, feedback may be the best solution. People oftentimes do not know what is expected of them; they are ignorant of required performance standards; or they fail to see the necessity or importance of the job performance. Feedback that is positive, immediate, specific, individualized, and consistent can be most effective in eliminating these types of performance problems.

### **Job Engineering**

If the execution problem centers on tasks that are being

done poorly or not being done, the cause may be the lack of proper equipment, a poorly designed work area, or a poorly designed job. Solve these problems by job engineering—giving proper equipment and work space or changing the order or grouping of tasks.

### □ **Change in Consequences**

If the execution problem centers on poor incentives for successful completion of the task, the consequences for good performance must be enhanced. You must always reward good performance. Jobs that are performed properly should always have positive, rewarding consequences. If your volunteers or employees are being “punished” for doing good work (you are then giving them more to do; you are showering more attention on the poor performers; or you are giving easier assignments to the poor performers), you must increase the positive consequences for good performance. Likewise, you must eliminate the positive consequences for poor performance.

## ■ **Involving Workers in Performance Problem Identification and Solution**

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If the needs assessment has revealed some performance problems that are execution problems, you may want to schedule a series of discussion periods devoted to addressing these problems. The group should be involved in both problem definition and problem solution. Use group discussion methods such as brainstorming and slip writing to define the problem. Use cause and effect analysis, data collection, and brainstorming to analyze and provide correction for the problem. Remember that performer involvement in problem identification and solution provides the best solutions for problems.

Involve all members of your organization and allow them to generate their solutions to the problems they are

experiencing. For example, if as the agency director you have noticed that your volunteers are often not punctual, you must involve the volunteers in problem identification, problem analysis, and problem solution. Both quality circle and participative management concepts emphasize and validate the importance of performer involvement. A participative management style is most necessary in solving performance problems in volunteer organizations.

## **Group Sessions for Performance Problem Identification and Solution**

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In a scheduled group session, you would define the problem as revealed by the needs assessment or ask the group to define the problem if the assessment merely indicated an area of confusion or concern. The problem must be stated as a behavior that can be seen as it occurs and counted as it happens. In other words, it must be observable and measureable. If you can neither see the behavior exhibited nor count the number of times it occurs, you have a vague, abstract problem which must be analyzed. To analyze vague, abstract problems, ask the group questions such as these:

- How do you know \_\_\_\_\_ is a problem?
- What behavior do you associate with this problem?
- When does \_\_\_\_\_ become a problem?
- How can you record the number of times this problem occurs?
- What could prevent or correct this problem?

In asking the group to develop solutions to the problem, you must be very careful to avoid any accusations of individuals as the source of the problem. In introducing a brainstorming session devoted to improving punctuality among volunteers simply say, "I realize punctuality is often a problem for all of us. We do not need to discuss how often we have or have not been punctual, for the past is something

we cannot control. We can, however, control the future. Now, I would like for us to brainstorm for ways to eliminate the problems that occur whenever we are late or cannot come for our scheduled time.” This focuses the discussion on problem solution and prohibits faultfinding and backbiting.

Never allow a participant in any group session to say anything negative about another participant. This will never do, and particularly it will never do when discussing execution problems and their solution. To eliminate this possibility, merely state that negative statements about *anyone* are not allowed in group discussions. Name calling and negativism stink!

## ■ Solutions for Knowledge Problems

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For solutions to knowledge problems, develop job aids and training programs. Job aids include charts, checklists, schematic diagrams, policies, procedures, and do-it-yourself manuals. For a desk volunteer at a historical complex, job performance aids might be a list of all available tours, their time schedules, and the cost for each as well as a policy and procedures manual. Job performance aids should do exactly what the term implies: help workers perform their jobs.

Again, involve the working group to develop both job aids and training programs. Be careful to use the working group to develop procedures and the management group to develop policy. The people responsible for performing the task (be it policy or procedure making or implementation) should be the ones who develop the needed job aids and training programs. The most effective trainers often come from the working group, and each group has someone with artistic talent who will excel in making beautiful prepared charts and overhead transparencies. All workers should, of course, be properly trained before assuming the responsibilities of their jobs; this is the trainer's primary responsibility.

It is impossible to prepare training programs and job aids without a complete understanding of the tasks each job requires. A thorough task analysis of each component of a job is the first step in solving knowledge problems and creating training programs to eliminate the problems.

## **Task Analysis**

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The task analysis is essential in developing job descriptions, job performance aids, and training programs. To analyze the tasks involved in each job is a very simple process:

1. Observe the task as it is done successfully.
2. Divide the task into its logical steps.
3. Consider any key points (particular steps that might be extraordinarily tricky or crucial).

Each job description should list the basic function of the job and the principal accountabilities of the job. Each accountability is further divided into tasks. All job performance aids should help the worker in performing the tasks of the job, and all training should prepare the worker to perform the tasks required in the job.

## **Writing Procedures Manuals**

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To provide a consistent, uniform understanding of the requirements of all jobs, you must establish procedures for each worker to follow in completing each task. The first page of the procedures manual should contain a flow chart of the activities and responsible personnel so that the procedure or job is seen in its relationship to the overall work of the organization. The procedures should be grouped according to their position on the flow chart.

An explanation of forms should also comprise a section



in the procedures manual. Steps to follow in completing each form should follow an example of the form. The procedure will state *when* in the task the form should be completed; the forms section will detail *how* the form should be completed. By separating explanations of forms from steps in procedures, a clearer picture of the steps involved in the procedure emerges.

Procedures should include the job title of the person who is performing the task and a description of the task. The job title should appear on the left half of the page and a description of the activity on the right half of the page. Number the activities and use verb-object form to describe the activity. For example, consider the following:

### **Procedures for Greeting Visitors at a Historic Complex**

- |                |   |
|----------------|---|
| Desk Volunteer | <ol style="list-style-type: none"> <li>1. Greets with a smile and welcoming comment each visitor as the visitor enters the door.</li> <li>2. Explains the historic complex.</li> <li>3. Gives information concerning tour times and costs.</li> <li>4. Invites visitors to tour the free exhibits and urges them to take one or more of the guided tours.</li> <li>5. Completes the Ticket Inventory Form.</li> </ol> |
|----------------|---|

A logically organized and clearly written procedures manual will be an essential training tool for the new worker.

## **Determining Training Priorities**

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After completing the needs assessment and determining the type of performance problem (knowledge or execution), you must decide those problems to tackle first. Your first concern should be problems that cause the greatest loss or present opportunities for greatest gain. Losses and gains

may involve money, time, effort, or volunteers. Often you will be tempted to ignore the losses and possible gains as you concentrate on problems with easy or simple solutions. You will then develop solutions and training programs to meet your simplest but not most vital needs. It is easy to fool yourself into thinking you are meeting your needs by developing training programs which are excellent examples of eyewash: they look good, but they don't address your major problems.

You must guard against the tendency to avoid your greatest problems because they seem overwhelming and nearly impossible to solve or remedy. You can accomplish wonders if you approach a problem in a logical fashion, divide it into manageable parts, and ask others for help.

### **Training Needs Assessment Exercises**

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1. Whom should you involve in planning and conducting your needs assessment?
2. Which type of assessment will you use? (You may use a combination of types.)
  - a. \_\_\_\_\_ Informal interviews
  - b. \_\_\_\_\_ Formal Interviews
  - c. \_\_\_\_\_ Observation
  - d. \_\_\_\_\_ Questionnaires
  - e. \_\_\_\_\_ Records and Reports
  - f. \_\_\_\_\_ Group Discussion
  - g. \_\_\_\_\_ Comments and Questions
3. Develop questions for your needs assessment.
4. Develop a list of possible training topics for people to rank according to their needs.
5. Who will conduct the needs assessment?
6. Who will respond to the needs assessment?
7. How will you evaluate the information you receive? What

**criteria will you use to determine your most important training, education, and development needs?**

- 8. How will you prepare needed procedures manuals and job aids? Who will be responsible for these? What completion dates will you establish?**
- 9. List your most important training, education, and development needs. Assign responsibilities for the development of formal programs to meet your needs. Determine completion dates for the development of these programs. Complete a Program Work Plan Form for each needed program.**

**C·H·A·P·T·E·R T·H·R·E·E**

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**Training**

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**Program**

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**Purpose**

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**and**

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**Scope**

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*“There’s no expedient to which a man will not resort to avoid the real labor of thinking.”*  
—Sir Joshua Reynolds

**I**n the development of a formal training program, some steps are interchangeable; some are not. It is essential that you conduct a needs assessment and determine your most needed training programs first. Then you must determine the scope and purpose of each program. These steps are not interchangeable and will require some directed thought. It is wise to develop only one program at a time, for program development requires ample time for thinking and planning. Although it is not impossible to develop several programs simultaneously, it is easier to focus all your attention on only one need and one subject. Of course, you may have several different individuals developing several different programs simultaneously, but each individual should attempt only one program at a time.

The individual who develops the training program begins by considering the program purpose and scope. The program purpose and scope center on what you as the trainer want to accomplish and what you want the trainees to learn. What you want to accomplish is a statement of purpose; what you want the trainees to learn is the learning objective. You should have one statement of purpose; you may have several (but not too many) learning objectives. These are the two immutable first steps in program development.

## **Statement of Purpose**

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Each training program—it makes no matter what type—must have a statement of purpose. As the trainer, program

facilitator, tour guide, panel moderator, or whatever, you must state the purpose in one clear and concise statement. This statement may have multiple parts, but it should be only one sentence. Now some highly sophisticated and wordy people will want to create unwieldy compound-complex sentences. This is acceptable, but a simple sentence with a compound subject, verb, direct object, or prepositional phrase will work quite well as a statement of purpose. It is absolutely essential that you distill all your many and varied thoughts into one statement of purpose. If you fail to begin with one purpose, your training program will become a multi-headed Hydra, and you know what problems Hercules had with that. You will have a creature that is difficult to feed—much less support, and the possibility of eliminating it altogether will disappear unless you can wield a powerful sword. It is far better to create simple programs with simple purposes than to try to put everything into one program.

## ■ Statement of Purpose Questions

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To determine your purpose, merely ask yourself any or all of the following questions and write your answer in one sentence.

- What do I want this training program to accomplish?
- What will this training produce?
- What type job performance will this training create?
- For whom is this program planned?
- What is the reason for all this effort?
- Why is this program needed?

Before developing a formal training program for interpreters (tour guides) at a historical complex, the volunteer

coordinator asked herself these questions. She determined that the purpose of the interpreter training would be to develop trained, professional interpreters for both the 1850 decade and the museum house with its surrounding dependencies. Notice the important concepts and limits established in this statement of purpose. The volunteer coordinator wants the interpreters to be both trained and professional; she wants the interpreters to be not only knowledgeable but also professional in manner and appearance. In addition, she wants their training to cover both the 1850 decade and a particular museum house and its dependencies. From this statement of purpose, she can begin to develop specific learning objectives.

## ■ Learning Objectives

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A learning objective is a statement of what the learner will be able to do, think, know, feel (or any other verb that will show some change in behavior) as a result of the training. Learning objectives always begin with the words *the learner will be able to*. The verb that follows this introduction indicates what behavior the learner will exhibit to show that learning has occurred: the magic has happened; the sun has appeared after the rain; the angels have opened the eyes of the blind. Learning may be the result of natural or supernatural change, but it is always evidenced by a change in the learner. Remember the focus is on what the *learner* will accomplish, not what the trainer will do.

Learning objectives are merely statements of what you as the trainer or program developer want the participants to learn. Learning objectives will determine both the type of training programs you develop and the topics the program will cover.

Oftentimes, you as the program developer or trainer may have established objectives only to discover that your

program participants have other, different objectives. This can lead to a mutiny. You know what happens to the ship's captain when there is a mutiny. To prevent your having to walk the plank, plan to allow participants to voice *their* objectives at the outset of the training program. Then scurry around during the next break planning to accommodate both objectives: yours and theirs. A good lesson plan design will begin with introductions and a statement of the trainer's objectives. Immediately, the participants should become involved in developing their personal goals or objectives for the training session. If the trainer's and the participants' goals are too varied in scope and purpose, your needs assessment has obviously failed to predict accurate training needs; you have failed to develop a program to meet those needs; you have not clearly defined the purpose of the program; or you have chosen the wrong participants for this training effort. If you are wise, you will have checked the validity of your program's objectives before beginning the program development.

### ■ **Example of a Good Learning Objective**

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A good learning objective clearly states who will do what. Most learning objectives are written using the following format: After successfully completing (*the training session*), the learner will be able to (*verb*) (*to what standards*) (*under what conditions*). An objective written in this format presents a precise statement and eliminates confusion.

### ■ **Types of Learning**

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Before rushing off and writing objectives, you must first understand the types of learning as defined by most training professionals. The types are generally termed knowl-



edge learning, skill learning, and attitude learning. Just to give you information to wield if you find yourself in the midst of a group of pedants, people familiar with Benjamin Bloom's works often use the expression "domains of learning" rather than types of learning. They may also use the term "cognitive" for knowledge, the term "psychomotor" for skill, and the term "affective" for attitude. You may also hear learning spoken of as data orientation, things orientation, or people orientation. Knowledge, skill, and attitude seem much simpler terms to work with and understand.

#### **Knowledge Learning**

We indicate to others that we have acquired knowledge of certain information or data by our ability to recognize, compare, correlate, integrate, or create identical, related, or new information or data based on the knowledge we have acquired.

#### **Skill Learning**

We indicate to others that we have acquired skill in performing certain actions by our abilities to perform the activity or task.

#### **Attitude Learning**

We indicate to others that our attitudes have changed by our emotional responses, statements of values, and our actions. We can say our attitudes have changed; but until we display evidence of the new attitude, our assertions may be doubted. Often attitudes pose the most difficult problems in training. We should always be very careful when trying to change attitudes. Successful changes in attitude will occur only when the participant decides the change should occur.

## **What Verbs Do You Use?**

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In writing learning objectives for the three types of learning, use the following verbs (or similar verbs) to describe

the changes in behavior that learning creates.

**Verbs for Knowledge Learning Objectives**

Describe, discuss, state, list, compare, contrast, select, measure, define, name, recall, recognize, label, indicate, explain, identify, conclude, separate, restate, summarize, defend, illustrate.

**Verbs for Skill Learning Objectives**

Perform, solve, demonstrate, assemble, role play, show, construct, use, compute, organize, select, develop.

**Verbs for Attitude Learning Objectives**

Feel, value, accept, perceive, listen, role play, receive, favor, be aware.

## **Writing the Learning Objectives**

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Some learning objectives may combine all three types of learning. For example, if you are training volunteers to work with visitors to a historical complex, you may have a learning objective that is a combination of the three types of learning. You may want the volunteer to interpret for the visitors the lifestyle of those who lived in Montgomery, Alabama in the 1850's. This is an objective that will require all types of learning: knowledge, skill, and attitude. The interpreters must know all sorts of things about the 1850's, the South, and Montgomery; the interpreters must be able to demonstrate their skill in explaining their knowledge to those whom they guide through the complex; and they must have an open, nonjudgmental attitude toward both the visitors and the 1850's.

In writing learning objectives, you must be aware of the types of learning and the verbs that will describe the changes this learning produces, but you must not regard these types and verbs as rigid. One verb may be used to describe all three types of learning. Use the types of learning and verbs as aids, not as rigid prescriptions.

## ■ **Statements of Standards and Conditions**

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Learning objectives may also include statements of standards and conditions. A standard is a statement of the acceptable level of performance. Standards indicate how much, how well, or how quickly the learner will be able to perform some action or task. Conditions indicate restrictions or aids which may help or hinder the performance. For example, a learning objective for a front desk volunteer at a historic complex might be as follows: The desk volunteer will be able to greet visitors with a smile and give information concerning the historic complex, the available tours, their times and costs in ten seconds flat with no notes and painful feet notwithstanding.

The conditions and standards are obviously humorously stated. Most often, statements of conditions and standards appear ridiculous unless one is preparing training for surgeons or astronauts.

## ■ **Steps in Writing Learning Objectives**

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1. Ask yourself what your trainees will need to *know*.  
When the volunteer coordinator began to develop a training program for interpreters, she asked herself what these interpreters would need to know. She determined that the interpreter would need to know the following:
  - the historical background for the United States, the South, and Montgomery, Alabama during the 1850's;
  - the architecture of the 1850's;
  - the lifestyle of the 1850's;
  - the furnishings and accessories of the 1850's; and
  - sources of further information; *i.e.*, the curator, the Alabama Historical Commission, Alabama Department of Archives and History, Landmarks Foundation source books, periodicals, books, and bookstores.

2. Ask yourself what your participants will need to *do*.  
The volunteer coordinator determined that the interpreters would need to do the following:
  - take their knowledge of the 1850's and put this information into a concise, interesting narrative—remembering that no one wants to know everything;
  - keep the tour moving by their voice, enthusiasm, and manner;
  - impart knowledge in a casual, non-lecture manner; and
  - be not distracted from the purpose of the tour by stories of what Great-aunt Agnes had, did, or said (not to mention felt).
3. Ask yourself what attitude your participants will need to *have*, to *develop*, or to *change*.  
The volunteer coordinator determined that the interpreters should express professional attitudes by being
  - nonjudgmental of both the visitors and the people of the 1850's;
  - interested in the tour (if the interpreters are not interested, the visitors will not be interested);
  - enthusiastic about the historical complex, history, and their roles as interpreters.
4. Write learning objectives to cover all types of learning the participants will experience in this training program.

## Sample Learning Objectives

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The learning objectives for the interpreters' training program were as follows:

1. The interpreters will be able to give visitors to the historical complex information centering on the historical background, architecture, lifestyle, furnishings, and accessories of the 1850's in a concise, interesting narrative developed by them after the first segment of their training.

2. The interpreters will be able to conduct tours in an organized, orderly fashion after the second segment of their training.
3. The interpreters will maintain a professional manner while functioning as representatives of the historical complex.

### **The Importance of Establishing the Purpose and Objectives of Training Programs**

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Successful training programs depend on a thoughtful approach to program design. The most tedious and difficult thinking comes in determining the purpose and the learning objectives, for all that follows depends upon this foundation of thought. If your initial thinking has been shallow and poorly considered, your training program will also be shallow and poorly considered. If you have carefully contemplated your program's purpose and thoughtfully developed learning objectives, you will have a sound foundation for building an excellent training program.

### **Training Program Purpose and Scope Exercises**

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1. List all needed training programs.
2. Evaluate the degree of need by assigning an *A* to programs of high need, *B* to programs of medium need, and *C* to programs of low need.
3. List all programs of high need.
4. Determine the most needed program by using the *A, B, C* method.
5. Write a statement of purpose for this most needed program. Consider the following questions:

- What do you want the training program to accomplish?
  - What will this training produce?
  - What type job performance will this training create?
  - For whom is this program planned?
  - What is the reason for all this effort?
  - Why is this program needed?
6. Write learning objectives for your most needed training program. Consider the following questions:
- What do you want the participants to learn as a result of this program?
  - What do you want them to know?
  - What do you want them to do?
  - What attitudes do you want them to have?
  - How will you be able to observe a change in behavior that will demonstrate that the learning has occurred?
  - What will the participants be able to do after the training that they could not do before?

**C·H·A·P·T·E·R F·O·U·R**

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Designing

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a

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Successful

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Training

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Program

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*“I’m a great believer in luck, and I find the harder I work the more I have of it.”*  
—Thomas Jefferson

**A**ll elements of training program design require work. Sometimes the work is mental; sometimes the work is physical. Nevertheless, work is work, and no successful training program was ever designed or developed without both physical and mental work. Work, however, does not have to be tedious. It may be exciting and fun, and certainly the work of creating a training program should be both. The luck you have in training program design and development will probably be in direct proportion to the amount of effort you expend.

After determining a program’s purpose and scope, you must next consider all sorts of things. You will need to develop a formal outline, select a type of training program, choose learning methods and aids, prepare a lesson plan, develop materials, and physically arrange tables and chairs in the training room. Some of these tasks are dependent upon others, and oftentimes it is easier to work on several at the same time. The outline and the lesson plan are interrelated, and the headings and subheadings of each should agree. They may or may not be developed simultaneously. Of course, both the outline and lesson plan should be built on the statement of purpose and learning objectives. The objectives should have clearly delineated the major topics, but the order of topics may change as you begin to work more closely with your materials. Indeed, both the outline and lesson plan may change as you work on them. A good program design will allow for change and evolution.

Likewise, the type of training program may change as you choose methods and materials—up to a point. It is easy for a seminar to become a workshop; it is a bit difficult for a



field trip to become a forum or a newsletter. Leopards cannot change their spots, but the most successful programs will naturally evolve if you allow them freedom to change and grow.

The secret of successful program design is flexibility combined with clear, logical thinking. A bit of fun helps, too. Taking this task too solemnly or seriously is deadly. Think how poorly you've been trained or taught in the past. Just count the number of mindless, boring, and often stupid presentations, training sessions, and classes you've attended—often conducted by “experts.” Don't be afraid that your program will bomb. What if it does? You're in excellent company, and you should learn more from your mistakes than from your successes. Follow the steps, think logically, strive for professionalism, be willing to work, and get started. NOW!

## ■ **Writing an Outline**

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An outline for the training program is essential. It should be the next thing you write after you establish the learning objectives. The outline and your lesson plan should agree in both order and form. Remember that they can both change and expand as you develop and plan learning methods and materials. An outline is merely a logical list of topics written in the order that you plan to cover those topics in the training program. The words *Introduction* and *Conclusion* may get you started. The introduction should involve introductions of both trainer and program participants, statements of objectives (from both the trainer and participants), and an outline and time schedule. Program participants feel more comfortable when they know how long it will be before breaks, lunch, and quitting time. Giving them this information early in the training program helps prevent their developing a hostage syndrome. The

conclusion should involve a summary and evaluation of the training program. All the middle should concentrate on the learning objectives. See, this won't be so hard to do; you've already written two major sections of your outline and lesson plan.

## **Steps in Developing an Outline**

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The following steps should help you to write an excellent outline:

1. Write a statement of purpose for the training program. Be able to write the purpose in a simple sentence. The sentence may have compound subjects, compound verbs, and/or compound objects, but it must be one sentence—and not a run-on sentence either. All other steps should relate to this statement of purpose.
2. Gather all your material. Consider these sources as you collect material for your training session:
  - personal experiences,
  - others' experiences,
  - observation,
  - books,
  - reference works,
  - magazines,
  - newspapers,
  - interviews.
3. Arrange your material in a logical sequence. A logical sequence may be one of the following:
  - order of importance,
  - complexity,
  - familiarity (moving from familiar ideas to unfamiliar ideas),
  - time (covering the topic from first step to last step or

from January to December or from any time sequence imaginable),

- alphabetical listing of topics (if there seems no other logical connection).

If the training program covers a number of random topics, these topics should be linked in some fashion. The connections may not be strong, but they must *be*; otherwise, the program becomes a hodge-podge of meaningless topics with no central focus. This will never do.

#### 4. Develop the outline.

Organize your outline with a beginning, a middle, and an end (or an introduction, a body, and a conclusion). The beginning of any training session should provide for a statement of learning objectives. The middle of the training session should accomplish these learning objectives. The end of the training session should restate the objectives and measure if the session has met the objectives. You should have come full circle. The objectives are statements of what you will cover in the training session; the outline and lesson plan are your guides to follow in covering the objectives; and the evaluation measures the success or failure of your accomplishment of the objectives. The middle of both the outline and the training session is the crucial part. It is here that you will succeed or fail in meeting your objectives. The middle should demand your greatest attention.

## ■ **Outline Form**

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Formal outlines are a necessity in training program development. A formal outline has major headings I, II, III; subheads A, B, C; subordinate subheads 1, 2, 3; and subordinate subhead subheads a, b, c. The divisions may continue *ad infinitum*. Outline form decrees that a subject should not

be subdivided if you have only one subhead. In other words, if you create a subhead A as a part of major heading I, you must create a subhead B. If you have an A, you must have a B. If you have a 1, you must have a 2. If you feel you need an A, but have no use for a B, you should rethink this section. Perhaps the A should be a major heading instead of a subhead, or perhaps the A could be divided into two subheads (it could grow into an A and a B). All subdivisions of a major heading relate to the major heading. All subordinate subheads relate to the subhead they follow. Each division of the outline should relate to the section or division it follows.

### **An Example of Outline Form**

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This example indicates the form an outline might take.

- I.
  - A.
  - B.
- II.
  - A.
    - 1.
    - 2.
    - 3.
  - B.
- III.
  - A.
  - B.
    - 1.
    - 2.
      - a.
      - b.
        - i.
        - ii.

Use this order of numbers and letters when developing outlines:

- Capital Roman numerals,
- Capital letters,
- Arabic numerals,
- Lowercase letters,
- Lowercase Roman numerals.

## ■ **Types of Training Programs**

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After establishing the training needs, writing a training program statement of purpose, developing learning objectives, and writing an outline, you then must decide the type of training program required by your needs. Actually, this step may come before or be simultaneous with the writing of the outline. In fact, as you write the outline, you may decide that you need two different types of training programs. For example, as the volunteer coordinator of the historical complex was planning a workshop for new interpreters, she decided that the workshop should be preceded by a tour of the historical complex that would be a demonstration of the interpreter's task. In other words, the interpreters would have an opportunity to observe an actual tour in progress before attempting to develop their individual tour narratives.

The following are terms generally used to designate the more typical types of training programs:

### **Clinic**

A clinic is a meeting or extended series of meetings that analyze and treat specific problems.

### **Colloquy**

A colloquy is similar to a panel. Colloquies involve three or four resource people and three or four participants. The participants express opinions, raise issues, and ask questions; the resource people respond to the questions.

**Consultation**

A consultation involves a deliberation between the trainer/consultant and one or more participants. The trainer/consultant may communicate with the participants by phone, letter, or on-site visits.

 **Correspondence Course**

A correspondence course is a self-instructional course using printed materials, audio tapes, films, or video tapes. The correspondence course may also involve consultations with the trainer, small group meetings, written assignments, examinations, and grades.

 **Demonstrations**

Demonstrations are essential to the teaching of job skills. A demonstration involves a skilled trainer who performs a task while specifying *what* the task involves, *why* the task is necessary, *how* the task is to be done, and *how well* the task must be done. Explanations of key points are always stressed. A key point is a particular element of the task that both makes the task easier to perform and is essential to the successful completion of the task.

After the trainer demonstrates the task, the participant then explains each step before attempting to undertake the task. The explanation before the “doing” prevents jammed equipment and other sorts of spilled milk.

 **Discussion Groups**

Discussion groups involve two or more people who informally discuss a topic of shared concern and/or experience.

 **Exhibits**

An exhibit is a display of related items that aids the learning process. The focus may be education, information, or inspiration.

 **Field Trips/Tours**

Field trips and tours are visits to places of educational interest for direct observation and study. Field trips usually involve less than four hours; tours may require one day to several weeks.

**Forum**

A speaker, panel, or film presents a topic. A moderator allows participants and forum speakers to voice their views in an orderly fashion.

 **Interview**

Participants interview resource people to gain knowledge.

 **Lecture**

A lecture is a formal, carefully prepared oral presentation by a qualified expert. Question and answer periods may follow lectures.

 **Newsletters/Circular Letters**

Newsletters and circular letters may contain written training information read by numbers of people.

 **Notebooks**

Notebooks filled with procedures, background information, and any other type of pertinent data will allow participants to learn at their own speed. Notebooks also serve as excellent references. All notebooks should be accessible to all participants.

 **Panel Discussion**

A panel discussion is a discussion among a group of four to eight experts before a training group. A moderator directs the panel. Participants may or may not address questions to the panel.

 **Programmed Instruction**

Programmed instruction is a self-teaching format using print, teaching machines, or computer-aided instruction. Programs for teaching basic skills are readily available.

 **Question and Answer Period**

A question and answer period follows a lecture, speech, panel discussion, group demonstration, or other formal presentation. This allows participants to ask for clarification or for information not covered in the formal presentation.

 **Seminar**

A trainer leads a discussion among a group of participants

by delivering a brief presentation and guiding a discussion in which all participants contribute.

□ **Simulation**

A simulation is a contrived education experience that seeks to simulate a real life situation. Driver training machines and war games are examples. Games are generally rather complex and time consuming; they are also rather difficult to design so that they will be applicable to the training program objectives.

□ **Symposium**

A symposium is a series of prepared lectures given by a group of lecturers (generally two to five lecturers). Each lecturer presents one aspect of the topic, and the presentations usually are not longer than twenty-five minutes each.

□ **Workshops**

Workshops provide extensive study of a specific topic. Workshop participants collectively develop new procedures or solve problems or create something. Participants are generally already somewhat experienced in their fields, and the workshop emphasizes a free discussion, exchange of ideas, and practical methods, skills, and principles.

## Selecting the Type of Training Program

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After reviewing the types of training programs, you should determine the type or types of programs that will best enable you to achieve your learning objectives. You may find that your objectives and outline will require several types of training programs. If this is the case, each program should then have its particular statement of purpose, objectives, and outline.

For example, in planning a training program for new interpreters at a historical complex, the volunteer coordinator first developed learning objectives. At the time she



wrote these objectives, she realized that training for interpreters would require more than one training program. Initially, she felt that one training program could accomplish her first objective that was as follows: The interpreters will be able to give visitors to the historical complex information centering on the historical background, architecture, lifestyle, furnishings, and accessories of the 1850's in a concise, interesting narrative developed by them after the first segment of their training.

After she created an outline for the first segment of the interpreters' training, she realized that this segment would be more effective if it were divided into several training programs. Consequently, she planned two seminars, one demonstration-tour, and one workshop-simulation to accomplish her first major learning objective. One seminar focused on the historical background architecture, and lifestyle of the 1850's. The second seminar focused on furnishings and accessories of the museum house the interpreters would be explaining to visitors.

These were now her major headings:

- I. Historical background of the 1850's
- II. Architecture of the 1850's
- III. Lifestyle of the 1850's
- IV. Furnishings and Accessories of the 1850's
- V. Furnishings and Accessories of the Ordeman-Shaw House and Its Dependencies
- VI. Creating a Narrative
- VII. Conducting a Tour

Realizing that she was about to bite off more than she could chew, she decided that the number of major headings required more than one training session. Next, she determined the type of program and the number of major headings to be covered in each program. She created the following divisions that would be most effective as four distinct and separate training programs:

□ **Seminar I**

The first seminar, Historical Background, Architecture, and Lifestyle of the 1850's, introduced the interpreters to general information concerning the period.

□ **Seminar II**

The second seminar, Furnishings and Accessories of the 1850's and the Ordeman-Shaw House and Dependencies, presented both general and specific information concerning the period and a specific historical building.

□ **Demonstration and Tour**

The third program was a demonstration and an actual tour led by the trainer. This presented information and modeled the performance expected of interpreters.

□ **Workshop-Simulation**

The fourth program allowed the interpreters to develop their own narratives and conduct a simulated tour for the other participants. Each participant could observe as others practiced the same skills and developed their individual styles and narratives.

You can readily see the importance of remaining open to change and evolution as you proceed with the steps involved in training program design and development. Each step logically follows the next, but often the focus or the details will change as you progress. Always remain open to new ideas and change. In this way, your training program will become a functional, living organism rather than a dry, desiccated relic.

## ■ **Training Program Design Exercises**

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1. Write in outline form the training program. Begin by considering the major points you would like for the participants to learn.
  - a.
  - b.

- c.
- d.
- e.

Arrange these points in a logical order.

- a.
- b.
- c.
- d.
- e.

2. For the first logical point, list subheads.

First logical point: I.

Subheads: A.

B.

C.

For the second logical point, list subheads.

Second logical point: II.

Subheads: A.

B.

C.

Now that you've gotten the idea, continue on your own with the logical points, subheads, and any subordinate subheads. Of course, you are not limited to only three subheads.

3. Write your outline in correct outline form. Each section of the outline should relate to the training program's statement of purpose, and the major headings within the outline should relate to the learning objectives.
4. Select the type(s) of training programs needed for each section of the outline. Of course, several sections may be combined in one training program, or the entire outline may constitute only one type of training program.

**C·H·A·P·T·E·R F·I·V·E**

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**Choosing**

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**Learning**

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**Methods**

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*“Skill comes so slow, and life so fast doth fly,  
We learn so little and forget so much.”*  
—Sir John Davies

**Y**ou have now determined the purpose and objectives of your training program; you have written an outline based on these; and you have selected the type or types of training programs you will develop. You’ve taken some major steps. Now it is time to select the learning methods you will use in the course of each training program. To choose learning methods wisely requires some understanding of how we think and learn.

We are thinking animals. Our ability to think is one of our essential powers, and it is a power we cannot turn off and on at will. Like it or not, we are always thinking. As Gilbert Highlet states so well, “Day and night, from childhood to old age, sick or well, asleep or awake, men and women think. The brain works like the heart, ceaselessly pumping.” Not only must we think; we must also learn.

Learning is a complex process involving both the mind and the body. Attempts to analyze how one has “learned” a particular skill bring to mind Eudora Welty’s example of W.C. Fields, “who read an analysis of how he juggled. He couldn’t juggle for six weeks afterwards. He’d never known how it was done. He’d just thrown up the balls and juggled.” So it is with all learning. Most of us have learned ideas, skills, and attitudes without an awareness of how the transformation occurred. Our storehouse of knowledge has come through our senses into our minds, and presto, we’ve learned. The process is acknowledged, but scarcely understood.

## **The Relationship of Memory to Learning**

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Learning is a process of moving information from our short-term memory into our long-term memory. Memory is not a video tape that records things as they happen; instead, it is a superb editing machine that records (possibly making two different recordings simultaneously) and edits according to our perceptions. These perceptions are influenced by our sensory organs: our eyes, ears, nose, tongue, and skin. We are constantly bombarded by a multitude of stimuli competing for our brain's attention. Many psychological and emotional factors influence our perceptions in addition to the physical stimuli. These multiple messages often overload our brains and prohibit learning (or even clear thinking, for that matter).

Good learning conditions help the brain to process these multiple messages as the brain receives them; they also lessen the amount of interference that would prohibit clear reception. As the brain receives these multiple messages, it first places them into its short-term memory bank. From the short-term memory, the brain will pick and choose the items to file in its long-term memory. The object of training is to present information so that the short-term memory will hold this information long enough for it to be categorized correctly and stored in the long-term memory for easy retrieval.

Short-term memory is limited in both the number of items it can contain and in the length of time it could hold these items. The average person retains a maximum of seven items in short-term memory. The number of items seems to determine the length of time the information may be held. One item can remain in the short-term memory far longer than six items. We should, therefore, limit the number of items that we present in each segment of a training program. This will allow the participants to retain and

synthesize the information. They can then move this new material into their long-term memory. Long-term memory has no limits. Its capacity is limitless. Mnemonic devices of all sorts help our minds to place information in the long-term memory and allow us to retrieve this information as we need it.

The most successful learning methods are those that help the mind to process information in an orderly, logical fashion. These methods help us assimilate and store new knowledge, skills, and attitudes without pressing the overload button and without being so tedious and boring that the mind seeks amusement elsewhere. The mind must be challenged and entertained but not overwhelmed.

## ■ **Ways to Help the Mind Learn**

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There are several important ways that we can aid the learning process. The most helpful ways involve a variety of methods and an organized approach. These are some ways trainers can help others learn.

□ **Present information in a variety of ways.**

Participants should be able to read, hear, see, discuss, and perform as they learn. Extensive research has revealed the following data: People remember ten percent of what they read, twenty percent of what they hear, thirty percent of what they see, fifty percent of what they both hear and see, seventy percent of what they both say and write, and ninety percent of what they explain while they are doing whatever the task may be. Exercises that involve the greater use of all one's faculties cause the greatest retention of learned material. The most successful learning methods will be those which help the mind to absorb, organize, and assimilate the new knowledge, skill, or attitude.

Recent research in brain dominance and neurolinguistics

emphasizes the need for a variety of learning methods. It is very important to remember that everyone does not process information in the same manner. Numerous studies have emphasized the differences in right-brain and left-brain functions. The left-brain excels in performing logical, analytic, and mathematical tasks. It is particularly adept at tasks which involve linear and sequential processing. The right-brain excels in nonverbal ideation, intuition, holistic, and synthesizing activities. It is particularly adept at tasks which involve spatial, visual, and simultaneous processing.

It should be obvious that the participants in any training program will prefer one mode of processing information to another. The right-brain dominant participants will like to see the whole picture; and a chart or graph of the overall concept, idea, or activity will help them to learn. The left-brain dominant participants will like written, sequential instructions. A step-by-step explanation will help them to learn. Since it will be rather difficult to divide the group, the trainer must present information so that either right-brain dominant or left-brain dominant participants will have an equal chance to learn.

A neurolinguistic approach to training will recognize that individuals process information in varying ways. Some people must see the information, skill, or attitude to understand and remember it. Others must hear it explained; they gather and assimilate information through their ears. Still others must experience it; they must either do the activity, or they must move about as they learn.

An understanding of this will lead the trainer to draw pictures both literally and figuratively; tell stories; create a verbal and auditory means of accessing the information, skill, or attitude; and allow participants to actually do or experience the thing that they are learning. Good trainers will allow people to move about freely, for this is the only way that some people can learn. Having a refreshment table and allowing participants to refresh their coffee, water, or



soft drinks will provide an acceptable excuse for those who need to move about as they learn.

□ **Organize items to be learned in clusters of seven or less.**

Three is an ideal number, but often an impossible ideal. Always limit the clusters to seven items. If the list consists of more than seven items or if the steps in the procedure are quite lengthy, create subdivisions. We like order and structure in our lives, and we like to believe that “six easy steps” will produce a wonderful product. Twenty-two easy steps would overwhelm us, and we would refuse to allow our minds to be boggled with so much.

□ **Present information in a logical sequence.**

Organize the material from the smallest to the largest, most important to least important, first things to last things, macrocosm to microcosm, or microcosm to macrocosm. The idea of a “whole” is very important. Use your imagination, but think logically in sequencing the material to be learned; also present the overall concept, view, or procedure.

□ **Use images.**

Thinking in pictures is the most creative and effective form of processing information. Describe ideas so that participants have a visual image they can see in their mind's eye; and provide illustrations of the knowledge, the skill, or the attitude that you wish them to learn. Examples of images that aid learning are graphs and models of the concept, visual demonstrations of the skill, and pictures of someone who is displaying the desired attitude through observable, measureable behavior. Videotapes are excellent for illustrations of observable attitudes. Developing visuals will require some creativity on your part, but creativity makes learning fun; it also makes designing and developing training programs fun, too.

□ **Provide memory links.**

We must be able to connect the new information with information already filed in our long-term memory. Just

remember all the devices you used when cramming for tests: rhymes, words whose letters stand for each idea, and sentences with the initial letter of each word being the same as the initial letter of the concept. Using parables, stories, and anecdotes—even jokes— helps the mind transfer the information into the long-term memory.

□ **Provide opportunities for spaced rehearsals of newly learned ideas or skills.**

Rehearsals or verbal repetitions of information are effective memory aids. Even more effective are spaced rehearsals, rather than nonstop or closely sequenced rehearsals. Breaks in the training session provide both mental and physical relief and are very necessary. When learning is most intensive, breaks or changes in the types of learning exercises must occur at least every twenty minutes.

All participants should have equal opportunities to absorb, organize, and assimilate the knowledge, skill, or attitude. Good trainers are aware of the multitude of ways that individuals process information, and they use a variety of methods to ensure that everyone learns easily.

## Characteristics of Adult Learners

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When one reads about adult learners, the term andragogy often appears. Andragogy is a highfalutin word for the theory of adult learning. Much furor has been raised about the differences between young learners and adult learners. In reality, the differences in how the two should be treated are slight; the difference in abilities and experiences are great. Basically, adult learners should be treated exactly as you like to be treated in a training session. Some of the things adults like (and children, too) are obvious. Most of what we as adults and as children dislike is the method in which we are taught. As Winston Churchill said, “Personally,

I'm always ready to learn, although I do not always like being taught." It is amazing what teaching has done to kill so much of the natural delight in learning. To prevent your killing anyone's delight in learning, the following concepts should serve as a helpful guide.

□ **Adults like to be treated with respect.**

Doesn't everyone? Courtesy, a regard for others, is a requisite when conducting training programs. In a supportive, caring environment people (like plants and all other living things) flourish. Learning is fun when your attempts to learn are not open to ridicule or other forms of disrespect.

□ **Adults like positive reinforcement.**

Doesn't everyone? Mark Twain's observation, "I can live for two months on a good compliment," says it all. Compliments do not need to be effusive; neither do they need to be numerous; they must, however, be "good." A "good" compliment is specific and rewards an accomplishment worth rewarding. Good compliments hearten the soul and provide the fuel needed to tackle the next learning challenge.

□ **Adults have established value systems and attitudes.**

Disturbing anyone's value system is a bit dangerous, but examining values and attitudes with neither praise nor criticism attached will often cause adults to view their values and attitudes more objectively. Then, they may change.

□ **Adults are often uncomfortable in a formal training session.**

Adults who find themselves in a formal learning or training program may be very negative. They may feel that the material is too difficult for them, or they may feel that the material is too simple. They may doubt their need to learn, and they may doubt that the trainer knows more about the subject than they do. Often they are humbled, chastened, and contrite after the program begins. The trainer's approach to either the haughty or defensive attitude is usually a critical factor. If the trainer matches the participant in either haughtiness or defensiveness, no one learns anything. The

trainer should be prepared to face both arrogant and defensive attitudes toward formal learning. If the trainer expects this mind set, he or she will not take the defensiveness personally and will instead work to overcome it with a supportive, concerned manner and a carefully prepared training program.

□ **Adults have knowledge and experience that may surpass that of the trainer.**

As Will Rogers observed, “Everybody is ignorant, only in different subjects.” Recognize the fact that participants have much knowledge and experience that, if shared with the training group, can often help in the learning process. The participants may even know more than the trainer about some subjects, and that is perfectly all right. If they happen to know more about the training program than you who are conducting the training, offer (or beg) them to aid or assist you. You will be surprised how helpful they will then be.

□ **Adults learn in more than one way.**

Occasionally, a guru appears who proclaims to have perfected the way that people learn best. Of course, the guru will also maintain this is the only way one may learn. This is a patent lie. People learn in a variety of ways. An individual may often learn most quickly in a particular way, but that way is not the only way he or she can learn. Trainers need to provide a variety of methods and learning experiences. With luck, one of these will be just the right method or experience for each participant to learn in the most efficient fashion.

□ **Adults need to understand the relationship between the training they receive and the problems they will encounter in their work.**

Adults learn if they feel the learning will help them to solve some immediate problem. The most common motivation for learning is the anticipated use of the knowledge, skill, or attitude. If the learning involves a behavior, skill, or

attitude the learners will not use immediately, postpone the training until the learning will be more relevant to their experiences in the “real world.”

□ **Adults educate themselves.**

Allen Tough recently conducted extensive research in Canada and other countries for the Ontario Institute for Studies in Education to determine all the things adults are trying to learn and all the methods they are using. His research produced rather astounding results. He found that eighty percent of adult learning is self-planned and self-guided. Only twenty percent of the adult learning projects were planned by a professional teacher, instructor, or trainer. As others have replicated Allen Tough’s surveys, they have confirmed his findings: The middle, or average, person conducts seven separate and distinct learning projects per year. For each of these distinct learning projects, the self-taught learner spends one hundred hours, and the same self-taught learner spends seven hundred hours or more each year learning. The seven average learning projects relate to all aspects of the learner’s life: home, family, hobbies, jobs, and community or volunteer work.

Volunteer organizations obviously have an eager audience of learners—many of whom will happily educate themselves if given only half a chance. Your major responsibility to these volunteers is to provide these willing adult learners with materials and opportunities that will help them to learn. The emphasis should always remain on the learner’s needs and the usefulness of the learning. These are the two most important elements in the learning process.

## **Learning Methods**

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In developing successful training programs, the most important element will be your ability to translate your learning objectives into learning methods that will accomplish the desired change in behavior. Learning methods are

the techniques trainers use in presenting knowledge, demonstrating skills, and revealing attitudes. Learning methods are also the vehicles that learners use to acquire new knowledge, develop new skills, and become aware of their attitudes.

Trainers should always remember that they can present knowledge so that it is easily understood, illustrate and demonstrate skills so that others can then perform those skills, but not necessarily change attitudes. Individuals must assume responsibility for changing their own attitudes. Often, however, an awareness of one's attitude will help an individual to seek ways of changing. If you, as the trainer, can help others to see themselves as they are, they will often want to change their attitudes. This self-awareness is what Robert Burns claimed as a God-given gift: "O wad some Pow'r the giftie gie us To see oursel's as others see us! It wad frae mony a blunder free us, And foolish notion." The message for trainers should be obvious: give the participants knowledge, demonstrate skills for them, and help them to see themselves.

## ■ Learning Methods Formula

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If you use a variety of methods, you will increase both participant interest and learning. People become bored very easily. Learning methods which require participants to use more than their eyes and ears are the most effective. Of course, it is often very necessary to present new knowledge by engaging only the participants' eyes and ears, but you should always try to adhere to the following formula:

First, present or demonstrate the knowledge, skill or attitude. Limit this presentation to twenty minutes—*at the very most*. Use visual and auditory and tactile examples. Express information so that participants can see, hear, and feel the concept.

Second, let the participants present, demonstrate, dis-

cuss, or consider the knowledge, skill, or attitude they are learning. Allow as much time as is needed. Remember that the best learning methods are those that involve the participants. Limit lectures and explanations by the trainers and other speakers to twenty minutes *at the most*. Remember Mark Twain's simple guideline for preachers: "No sinner is ever saved after the first twenty minutes of a sermon." Indeed! And no one learns much after twenty minutes of uninterrupted listening to someone else pontificate.

Learning methods may be logically grouped as follows:

- Presentations,
- Demonstrations,
- Group learning experiences,
- Individual learning experiences, and
- Structured learning experiences.

Remember to choose only twenty minutes worth of the first two groups: presentations and demonstrations. Then choose however much it takes of the last three groups: group learning experiences, individual learning experiences, and structured learning experiences.

## **Group One: Presentations**

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### **Lecture**

This much-used and much-abused learning method has several advantages: it gives the trainer complete control; it saves time when there is a tremendous amount of material to cover in a short time; and it can be used well with extremely large groups. The lecture method also has disadvantages: it requires a vast amount of preparation; it does not allow for feedback (unless the lecturer encourages participants to interrupt whenever they have questions); it creates boredom; and it does not allow much learning to occur. If you feel you must lecture, provide the participants with visuals to illustrate your lecture (flip charts, overhead

transparencies, slides, and video tapes) and handouts to facilitate the taking of notes. Notice that the handouts should not cover every word you are saying. Taking notes is often an effective way of transferring knowledge from the speaker's mouth to the note-taker's mind and memory.

### □ **Short Lecture**

Short lectures (three to five minutes) can be very useful in giving an overview of a concept which will occupy the next hour or so of learning time. Formal training programs such as seminars and workshops frequently use short lectures to introduce and explain concepts and skills. Each item on your outline deserves at least a five minute explanation before you launch into its subheads, and subheads also need short lectures to prepare participants for what is to follow.

### □ **Skits**

Skits are most helpful in getting group commitment to a change in procedures. Skits may show the incorrect procedure first and follow with an example of a correct procedure. This type of skit is particularly useful if the skits involve the senior volunteers or the paid staff in a ridiculous skit emphasizing the incorrect way of doing something. This allows everyone to laugh at himself. **CAUTION:** Use only volunteers and paid staff whose reputations are very secure as excellent workers.

## **Group Two: Demonstrations**

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### □ **Demonstrations**

Demonstrations work best with smaller groups. They are wonderful learning methods if everyone can see what is being done and hear the explanation. If the participants have a chance to practice the skill that has been demonstrated, demonstrations are excellent learning methods.



**Rehearsals**

Rehearsals are excellent teaching devices for training public speakers and trainers. Actually performing (for speakers and trainers are both performers) before a friendly critic or observer will be a wonderful practice before the actual event.

 **Coaching**

The participants receive instruction as they actually perform the task. This is helpful, but the participant should also be allowed to perform the task without coaching.

### **Group Three: Group Learning Experiences**

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 **Crawford Slip Writing**

This method, named for its originator, C. C. Crawford, a professor at the University of Southern California, is an excellent method for solving “how to” problems. Everyone in the group receives 3" x 5" slips of paper or note cards (but you don't have to be a purist about the size—any size will do). The group leader asks the group to write solutions on the slips for a “how to” problem. The “how to” question should be a general question such as “How can we improve our services to clients?” Each answer to the problem is written on a separate slip of paper. This method works best with general questions which require a number of varied solutions. Also use slip writing to gather ideas. Sort the ideas into related groups. Present the grouped ideas in written form on a handout or on newsprint for everyone to see. Use additional slip writing to elaborate on the basic suggestions and to define solutions to various problem areas.

 **Brainstorming**

This method, probably named because it creates quite a

storm in the brain, works best with groups of six to twelve participants. Brainstorming will provide solutions to more specific problems. General problems do not work well, for the group goes off in too many different directions. Solutions are best if the group has some background information concerning the problem. A one-page handout is often helpful. A mixture of participants from all segments of the volunteer organization will produce the best solutions, but participants should be of the same rank. Higher-ups tend to obstruct the process, but they may find brainstorming useful within their peer group. Brainstorming allows individuals to make as many or as few statements as they wish, but a great quantity of ideas is most desirable.

#### □ **Rules for Brainstorming**

1. Quantity, not quality, is the goal.
2. Building on others' ideas is wonderful.
3. Unusual, weird, seemingly impossible ideas are great.
4. Individuals offer ideas rapidly in an orderly succession, but they may "pass" if they have no ideas. They may also take a turn after passing if they have a sudden inspiration.
5. Never, never is anyone allowed to criticize anyone else's idea or suggestion.

Brainstorming usually moves along rather fast. The trainer may need to use a recorder to help record all the ideas on newsprint with magic markers. After brainstorming, use multiple voting to select ideas for further examination or implementation. Multiple voting allows individuals to vote as many times as they like to any ideas they like. Ideas with the greatest number of votes become the focus of further examination.

#### □ **Buzz Groups**

Buzz groups are excellent ways of getting group participation. After presenting an idea or concept, informally divide the

group into subgroups of three to five people. Have them discuss the idea or concept and choose one person from the buzz group to report the subgroup's findings to the entire group. A slight variation of this requires that six people discuss an idea for six minutes before reporting to the group. If you use buzz groups more than once in a training session, request that each person in the group have an opportunity to function as the reporter.

#### □ **Nominal Group Approach**

A. L. Delbecq and A. H. Van de Ven developed this approach to encourage a large number of detailed suggestions or delineate a number of problem areas while providing for personal, radically different points of view. A nominal group is one where everyone works on the same issue at the same time with very little interaction. Participants form small groups of six or seven members. Each person lists silently his feelings about the topic, the question, or the problem. In each small group, the individuals will present one point in turn. A recorder will write each point on a master sheet. The small group members, individually and silently, rank the three, five, or ten most important points on the master sheet. These individual rankings are tallied and reported to the entire group. This approach will reveal individual views and provide a group rating of these views.

### **Group Four: Individual Learning Experiences**

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#### □ **Reading**

Handouts, articles, and books can be very useful learning media. It is wise to allow time for training groups to read the handout material during the training, and it is most helpful to allow for some discussion of this material. The only problem arises if your group consists of participants with vast differences in reading levels. Recommending

books and articles for additional study is an excellent idea. Just be sure that you have read the material yourself and understand its application to the particular performance problem, knowledge, skill, or attitude.

## **Group Five: Structured Learning Experiences**

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### **Role Playing**

For role playing to be successful as a learning method, it must be a carefully prepared exercise. The best way to use role playing is as a learning method for groups of three. You may have more than one group of three, but each group should have three members. Each person then gets to play both roles and also to function as an observer of others in the roles. To do this requires three separate situations involving an observer and the same two roles. For example, a role play involving communications skills to be used with clients could involve a volunteer/paid staff role, a client role, and an observer. By having three different situations, each person in the group would get to play each role and function as the observer. This allows each participant to experience a role reversal—a walk a mile in my moccasins routine. Do not ask participants to just make everything up. This is often very difficult for them, and it fosters no learning if one is busily trying to create a situation and a personality while at the same time practicing new skills. You should never put anyone in misery or in an uncomfortable situation; instead, you should design role plays that give the participants all the information they will need to practice new skills comfortably.

### **Behavior Modeling**

Behavior modeling is a very effective means of changing behavior. It involves a discussion of effective behaviors and structured role plays that involve the use of these behaviors.

First, the effective behaviors must be listed and explained and discussed in sequential behavioral terms. These must be clear statements of behaviors that can be seen and measured. To effectively model behavior, allow each participant to practice the behavior in the structured role plays. Have observers evaluate the behavioral sequences.

*Example of Sequenced Behavior: Method of Handling Complaints*

1. Listen carefully.
2. Respond with empathy.
3. Obtain all the details of the complaint.
4. Show the situation causing the complaint is completely understood.
5. Present your position. (Here you may need to establish agency procedures for various types of complaints.)
6. Agree on follow-up action.
7. Set a specific follow-up time if immediate action cannot be taken.
8. Thank the individual for presenting the complaint.

**Videotaped Role Plays/Behavior Modeling**

This is often very revealing to the participants, but it also causes much participant stress. Video cameras are becoming very common, but they still frighten people. Video cameras remove all excuses for not seeing yourself as others see you. This characteristic makes them both helpful and frightening.

**Case Studies**

Case studies are useful in studying situations that have or could have happened to an organization similar to yours. Small group discussion of cases is often helpful if the cases parallel your organization's current problems and if another group has successfully addressed these problems. We can learn as well from other's mistakes as from our own—particularly when the others have changed their mistakes into successes. Writing case studies takes some skill and practice. Perhaps you can gather information for

the preparation of a case study at conferences where you often encounter individuals whose organizations have experienced problems similar to those of your organization.

### □ **Minicase Study**

Minicase studies involve brief situations for groups to study and solve. A case study may survey an organization's problems and steps to alleviate these problems over the course of many months or even years. A minicase study may only cover an hour, a day, or a week.

### □ **Critical Incidents**

Critical incidents are illustrations of the most dramatic or important aspect of a case study. They usually involve confrontations and require the trainer to lead a discussion of the alternatives facing the individuals. The trainer should be prepared to focus the direction of the group discussion. In preparing critical incidents, the participants have all the information needed to solve the problem, but the group must discover causes and supply effective solutions.

### □ **In-Basket Exercises**

In-basket exercises are a modified form of the case study. Each participant receives an assortment of letters, memos, in-house communications such as newsletters, telephone messages, procedures manuals, and the like. The participants write responses to each item requiring an action on their part. Each participant works on the same in-basket, and a specific time is allotted for completion of the exercise. Time is usually at a premium, and this adds some stress to the exercise. In-basket exercises require a great deal of time, thought, and effort to create. Small group discussions of solutions to the in-basket problems are helpful in analyzing various approaches to satisfactory solutions.

### □ **Exercises**

Exercises involve participants and require that they use information about themselves and their organization. Exercises have clearly defined objectives, and they are

usually discussed and evaluated with the entire group. All exercises should relate to the learning objectives, and the trainer should emphasize this relationship.

From these varied learning methods, select those that will best fit the knowledge, skill, or attitude that you want the participants to learn. Choose from all the groups the methods best suited to your needs.

## ■ **Choosing Learning Methods Exercise**

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□ 1. Before choosing learning methods consider how you can best help participants understand both the overall concept as well as each facet of the concept. Consider both the organic and functional relationship between the parts and the whole. Choose methods based on the following formula: First, present or demonstrate the knowledge, skill or attitude. Limit this presentation to twenty minutes—*at the very most*. Use visual and auditory and tactile examples. Express information so that participants can see, hear, and feel the concept. Second, let the participants present, demonstrate, discuss, or consider the knowledge, skill, or attitude they are learning. Allow as much time as is needed. Write the learning methods chosen by each point on the outline.

**C·H·A·P·T·E·R S·I·X**

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**Preparing**

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**for the**

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**Training**

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*“It is thrifty to prepare today for the wants of tomorrow.”*

—Aesop

**Y**ou have conducted the needs assessment, determined the purpose and scope of the training program, designed the training program, and chosen learning methods. Now you must begin to prepare for the training program. You will need to prepare training materials, write the lesson plan, and prepare the training room. As you were writing the outline and choosing the learning methods, you were, of course, also thinking of materials you would need. A well-executed training program will require a variety of well-prepared training materials.

## **Ten Essential Training Materials**

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Hundreds, if not thousands, of wonderful training materials await your open pocketbook. The funds you have at your disposal will probably limit the number and variety of training materials you choose. Excellent training programs, however, do not require expensive materials. The following is a list of ten essential and relatively inexpensive training materials:

### **1. Checklist**

A checklist of all supplies and materials will help you to remember all that you will need for the training program.

### **2. Easel**

An easel may be a cheap wooden one from the art supply store. Tape the newsprint pad to it and pray that it doesn't collapse. An expensive metal easel with clamps and screws to hold heavy prepared charts should be the

first piece of expensive equipment you purchase.

### 3. Flip Chart Paper

Expensive flip chart paper is very nice for prepared charts which you plan to use for more than one seminar or workshop. Chart paper can be purchased with faint blue one-inch square divisions that make spacing letters and words a much easier chore. This should be your second expensive purchase. Newsprint pads will work just as well if your funds are limited.

### 4. Folders

It is very nice to have folders for participants to put their notes and handouts together in one place. These may be inexpensive folders or expensive ring-binder notebooks.

### 5. Handouts

Everyone likes handouts that contain needed information in a brief, concise, easy to read format. Lots of white space is necessary for effectiveness. The white space leaves room for notetaking, too. If a seminar or workshop requires many handouts, they may be placed in participants' manuals or folders.

### 6. Markers

Markers come in all sizes and colors. The best size is the standard size. The most visible, cheeriest colors are green, blue, red, and purple. Yellow is nearly invisible, and other pastel colors are almost as bad. Brown and black are awful unless used for underlining and emphasis. Then they are still rather heavy and depressing.

### 7. Masking Tape

Masking tape is essential. (What else will fix both a ripped hem and a torn chart?) You will need this tape to attach newsprint sheets to the walls. People like to see their ideas in print, and they also like to look at what has gone before. All comments recorded on the response chart should be placed on the walls. (First, check to see

that the tape does not damage the paint or wallpaper.) Never be without masking tape; it can fix numbers of things.

#### 8. Nametags

You may use nametags that stick or pin on the participants' clothes, or you may use name tents which are placed in front of each participant. If possible, have someone who prints in letters which are readable from a distance to letter the nametags and name tents. Write the name on both sides of the name tent so that everyone can see the name. Nametags make it easier for the participants when they will be working in a number of small groups. Name tents are easier for trainers to see. Why not use both? Then the trainer can see the names easily when speaking to or working with the entire group, and the participants can see each other's names when they are working in groups. Nametags may be made from any paper, and name tents can be cut from any card weight paper. Manila folders will do if card weight paper is not to be found. Cut the folders in six-inch by four-inch rectangles and fold in half lengthwise. Presto! you have name tents.

#### 9. Newsprint Pads

Newsprint pads are available at any art supply store. These you *must* have to record group suggestions, ideas, and main points of your presentations. If your organization is on a very tight budget, perhaps your local newspaper will have some newsprint they will donate to the cause.

#### 10. Paper and Pencils

Participants must have materials for taking notes, and often they have brought none with them. If handouts are a part of the training session, they may take the place of paper for notetaking. Usually, there is enough white space to accommodate all the notes one needs to

take; occasionally, exercises will require more paper than the handouts will provide.

## ■ **Nice-To-Have Material and Equipment**

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If your training budget will allow the purchase of expensive equipment, there are many lovely things you can purchase. The following are all very nice-to-have pieces of equipment, but you can also get along without them:

### **Overhead Projectors, Transparencies, Lettering Machines**

These are all very nice. You may use plain copier film, or you may purchase an infrared transparency marker. Color on clear film is the prettiest and most legible transparency film. The black on clear film (which the plain paper copier can process) can be enhanced with permanent ink transparency marking pens. Be careful when buying projector pens to notice if they are permanent or if they wash off. You may write on an expensive transparency with a permanent pen and ruin your transparency. Lettering machines, a good eye, and a tiny bit of artistic talent will allow you to design and make professional looking transparencies. If money is no problem, there are many outstanding professionals who will be happy to take your money and make you the most scintillating transparencies imaginable.

### **Screens**

Screens are not too expensive, but a white wall works just as well. If the training room has patterned wallpaper, a screen will be necessary, or you could enlist some volunteers to paint the wall.

### **Slide Projectors and Slides**

Slides are relatively cheap if you have a volunteer who has a good camera and knows how to use it. The film is not too expensive, and people love to look at pictures—if you do

not overdo it by showing hundreds of slides. If you must pay for the camera or the professional photographer, forget it unless you have budgeted for either expensive equipment or professional services.

#### **Film Projector and Slides**

Film projectors are expensive; so are films—not to mention the difficulty involved in finding a good one to meet your needs. Good films, however, are great aids.

#### **Video Cameras, Video Tapes, and Playback Units**

All this equipment (except the video tapes) is expensive. It is excellent, however, for allowing participants to see how they actually appear and sound to others. A professionally-produced video tape is expensive, but a tape of a skit or demonstration with no editing is rather cheap.

#### **Tape Recorders and Audio Tapes**

These have limited use as training aids. People also don't like talking into them, but hearing how you sound is often a great incentive to changing that sound.

#### **Chalkboards**

Chalkboards make you sneeze and cause your skin to peel. They also mess up both your clothes and the carpet. They are, however, relatively cheap. A good substitute is an easel with a porcelain white enamel surface which may be written on with water-soluble markers. The problem with the porcelain surface is that invariably someone will use the wrong type marker, and then the surface is permanently stained.

#### **Copying Machines**

Copying machines are very nice for copying handouts and often cheaper than having them copied at a print shop. The best prices at a print shop come with heavy volume.

## ■ **Preparing Training Materials**

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Practice always makes one better—if not perfect. In preparing training materials such as handouts, prepared charts, and slide shows, you will find that your work will appear more professional as you create more and more training materials. You will learn a great deal by doing. The following guidelines and hints should help you with your first efforts:

### **Handouts**

Handouts should contain clearly written, briefly stated, pertinent information. Leave lots of white space. The following are ideas for handouts:

- Exercises;
- Training session outlines;
- Lists of ideas, steps to follow, items in a group, or anything you want to be certain everyone knows exactly; and
- Role play background information.

### **Prepared Charts**

Prepared charts are essential aids for both the trainer and the trainee. They allow the trainer to talk without appearing to depend on notes, and they give the trainee a visual reinforcement of the ideas or concepts. Use either the expensive lined paper or use cheap newsprint pads and draw with faint pencil lines your own guidelines. These guidelines should be one inch apart. You may also prepare a lined card of tagboard and use it as a guide behind each sheet as you write. When writing on a prepared chart (one which you will not tear off and tape to the walls), always skip every other sheet so that the words from the sheet below will not show through the top sheet. When using new markers, put an extra sheet between the two to absorb all the excess ink that will run through the top sheet. You may use one torn-off sheet again and again for this purpose.

When writing on prepared charts, use very few words and leave lots of white space. Do not turn the marker as you

write. If you hold the marker steady and keep the point of the marker at the same angle, your line widths will be uniform on each letter. Use three one-inch lines for each line you write; that way your tops and bottoms of letters will not run into each other. Print. Use capital letters only for the first letter in lists on charts; otherwise, use lowercase printed letters. Set off each line with dashes, or dots. Use a ruler to underline once or twice with a contrasting color important words or headings of charts. Use bright, visible colors.

Make tabs with card weight paper (manila folders are good) and staple them down the side to allow turning of the pages with ease and to locate a previous page without fumbling through the entire chart. Staple the tabs to both the top sheet and the plain sheet below it. Turn sheets by putting your fingers at the tab and running them down to the bottom left corner of the sheet before trying to turn the page to the back of the easel. This will prevent wrinkled, torn sheets.

### □ **Overhead Transparencies**

Companies that manufacture transparency film have excellent guides for making transparencies; write for one. These are some of the most important points to remember:

- Limit your original to seven and one-half inches by nine inches, for the transparency frame will cover the transparency up to these dimensions.
- Use freehand art, clippings from magazines and newspapers, traced letters, or the largest size (fourteen point) typewriter type. Caution: Do *not* use a regular pica or elite typewriter element. This will produce a transparency that is impossible for either you or the participants to read.
- Letters should be at least one-quarter inch in height. (If your original can be read from a distance of ten feet, it will project well as a transparency.)
- Use type or art that is carbon-based. India ink, number two pencils, carbon typewriter ribbon, newsprint, and

some magazine print will make excellent transparencies.

- Use permanent pens to provide color for the plain paper copier film.
- Use no more than seven lines of print on each transparency. Crowded transparencies are awful.
- Use either the vertical or horizontal format.

### □ **Slide Shows**

Slide shows are great for presentations. They are relatively easy to prepare, and they work well with large groups. In planning the length of slide shows, remember the old saying, “The mind can only absorb what the seat can endure.” These are some of the important points to remember about slide shows.

- First, write the script.
- Think of each slide as a brief paragraph.
- Use three-inch by five-inch cards to sketch each visual idea. This is called a storyboard. Use one storyboard for each slide.
- For typographic slides, use no more than five or six brief lines—very brief (like only one or two words). Simplify, simplify, simplify.
- For photographic slides, vary the people, places, and things. Also vary the camera distance and angle.
- Arrange the slides in order.
- Check slides with the narration.
- Put a thumbspot in the lower left corner of the slide mount as the slide should appear on the screen. When placing the slides in a circular slide tray, the thumbspot should be in the upper right corner of the mount. Using this technique will eliminate upside down, backward slides.
- Rehearse many times. Do not read the script. This is the most boring sound imaginable.

### □ **Video Tapes**

Video tapes do not need to be professionally taped or edited, but they do require some careful preparation and the



willingness to shoot a scene over and over and over (the urge will also come to shoot some of your amateur actors and actresses, but this, too, will pass).

## Lesson Plans

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Lesson plans are essential. For a short training program, you may not choose a formal lesson plan; an outline will work just as well. Training programs lasting half a day or for several days will, however, require a formal lesson plan. If your training program requires a large number of transparencies, you may substitute prompt cards for a lesson plan. Prompt cards are sheets of paper the size of the transparencies which contain directions for the trainer. These prompt cards are inserted between the transparencies and prevent the trainer's fumbling around trying to figure what comes next. If your training session requires no handouts, prepared charts, or any other materials other than transparencies, the trainer may write notes and comments on the frames of the transparencies and eliminate the need for either prompt cards or lesson plans.

Lesson plans should be simple road maps for the trainer. They should be typed or clearly printed and placed in a three-ring notebook. The lesson plan is merely a guide, and the trainer will soon learn to sneak glances at the lesson plan while the participants are reading handouts or participating in group exercises. Your goal should be to become so adept at sneaking glances that the participants are never aware of your following a lesson plan; they should believe that you have all knowledge and organization firmly imprinted in your mind. The notebook will allow you to flip forward without any great confusion and keep the pages from falling on the floor and creating mass chaos.

The trainer *never* reads from a lesson plan. The plan is merely an outline that includes the methods and aids. Any

statements, explanations, or brief lectures should be informal but well-considered statements. Remember, the trainer is not the star; the learners are the stars. Let them do the talking! The trainer presents the information; the learner reacts, assimilates, discusses, or practices learning the new behavior.

Always type the outline, methods, and aids in capital letters. Then underline the important words or instructions. If the important words of instructions are capitalized, the next topic will jump out at you, and you can speak convincingly without having to stop and locate your place. Prepare your lesson plan so that a visual reminder of the topic is always in front of the trainees; prepared charts are excellent for this, and they serve as notes for the trainer, too. Always triple space between the parts of the outline as they appear in your lesson plan. Double space between the explanations that might follow or between a listing of methods and aids. Let your eye be your guide, and be generous with the white space.

## **Sample Lesson Plan**

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These sample lesson plan pages are the first three pages of a lesson plan based on this book. Typed lesson plans are easiest to follow. You may or may not want to follow the spacing used here, but you can readily see how easy these plans are for anyone to follow.

List methods in the right-hand column in capital letters. A glance at this column will guide you for twenty minutes or so, and you can always look ahead while the trainees are completing an exercise or reading from the participants' manual or handout. The left-hand margin may be used for time notations. Remember, however, that different groups cover the same concepts at different speeds. Always prefer quality to quantity. Never press your participants merely to adhere to some rigid time schedule. Always allow time for

# 90 YOU CAN TEACH OTHERS

## LESSON PLAN

COURSE: YOU CAN TEACH OTHERS

LENGTH: ONE DAY [WITHOUT VIDEO TAPES AND CRITIQUES OF PARTICIPANTS]  
TWO DAYS [WITH VIDEO TAPES AND CRITIQUES OF PARTICIPANTS]

INSTRUCTOR MATERIALS: LESSON PLAN, PARTICIPANTS' MANUALS, EASEL, PREPARED CHART, RESPONSE CHART, OVERHEAD PROJECTOR AND TRANSPARENCIES, MARKERS  
VIDEO CAMERA, PLAYBACK UNIT

PARTICIPANT MATERIALS: PENCILS, NAMETAGS, AND MATERIALS NEEDED TO PREPARE SHORT TRAINING SESSIONS TO BE VIDEOTAPED]

CONTENT	METHOD
<p>I. <u>INTRODUCTION</u></p> <p style="text-align: center;"><u>PREPARED CHART</u></p> <p style="text-align: center;">WELCOME TO YOU CAN TEACH OTHERS</p> <p>A. <u>INTRODUCTION OF TRAINER</u></p> <p>B. <u>INTRODUCTION OF PARTICIPANTS</u> Each participant introduces the individual on his right. Introductions should include name, organization, and training responsibilities or duties within the organization.</p> <p>C. <u>COURSE OBJECTIVES</u></p> <p style="text-align: center;"><u>RESPONSE CHART</u></p> <p>Each participant gives a brief statement of personal goals and objectives for the training session.</p> <p>These objectives are written on the response chart and then taped to the wall. They will serve as reference points during the seminar and as evaluation criteria at the end of the seminar.</p>	<p><u>PREPARED CHART</u></p> <p><u>SELF-INTRODUCTION</u></p> <p><u>GROUP INTRODUCTION</u></p> <p><u>RESPONSE CHART</u></p>

CONTENT	METHOD
<p style="text-align: center;"><u>PREPARED CHART</u></p> <p>After successfully completing this seminar, all participants should be able to</p> <ol style="list-style-type: none"> <li>1. Explain the need for a professional approach to training in volunteer organizations;</li> <li>2. Plan for successful training programs;</li> <li>3. Determine their organizations' training needs;</li> <li>4. Develop training programs to meet their organizations' needs;</li> <li>5. Conduct effective, professional training programs;</li> <li>6. Evaluate training programs.</li> </ol> <p>D. <u>THE IMPORTANCE OF TRAINING IN ANY ORGANIZATION</u></p> <p>1. <u>DEFINITION OF TERMS</u></p>	<p style="text-align: center;"><u>PREPARED CHART</u></p>
<p style="text-align: center;"><u>PREPARED CHART</u></p> <p><u>Training</u></p> <p>Training improves an individual's job performance.</p> <p><u>Education</u></p> <p>Education prepares individuals for jobs beyond their present jobs.</p> <p><u>Development</u></p> <p>Development prepares individuals for growth and change as their organization grows and changes.</p>	<p style="text-align: center;"><u>PREPARED CHART</u></p>

CONTENT	METHOD
<p>2. <u>THE ORGANIZATION'S NEED FOR TRAINING, EDUCATION, AND DEVELOPMENT PROGRAMS</u></p> <p style="text-align: center;"><u>OVERHEAD #1</u></p> <p style="text-align: center;">"If a little knowledge is dangerous, where is a man who has so much as to be out of danger?"</p> <p style="text-align: center;">Thomas Henry Huxley</p> <p style="text-align: center;"><u>OVERHEAD #2</u></p> <p style="text-align: center;">"Why should society feel responsible only for the education of children, and not for the education of all adults of every age?"</p> <p style="text-align: center;">Erich Fromm</p> <p style="text-align: center;"><u>RESPONSE CHART</u></p> <p>Have each participant respond to the following questions:</p> <p>What types of programs--training, education, and development--does your organization need?</p> <p>Who needs to participate in each of these types of programs?</p> <p>What topics should each type of program cover?</p>	<p><u>OVERHEAD #1</u></p> <p><u>OVERHEAD #2</u></p> <p><u>RESPONSE CHART</u></p>
<p>E. <u>THE TRAINER'S QUALIFICATIONS AND RESPONSIBILITIES</u></p> <p style="text-align: center;"><u>PARTICIPANTS' MANUAL</u></p> <p style="text-align: center;">PAGE 1</p> <p style="text-align: center;"><u>INTRODUCTORY EXERCISE</u></p> <p>Have each participant complete the introductory exercise by considering</p> <ul style="list-style-type: none"> <li>● personal characteristics of trainers,</li> <li>● job responsibilities for trainers, and</li> <li>● recent training experiences.</li> </ul> <p style="text-align: center;">102</p>	<p><u>PARTICIPANTS' MANUAL</u></p>

learning to occur; the learning is the important thing—not the time schedule.

Design the lesson plan so that breaks will not interrupt the learning of a major concept. Plan to have breaks fall every hour to hour and a half; never go longer than an hour and a half without a break. Breaks do not have to be lengthy, but they must be frequent. The exercises determine the break times. Whenever an exercise is completed and an hour or so has passed since the last break, stop for another. Too many breaks are preferable to too few. An uncomfortable participant learns nothing. Provide ample time for comfort breaks, but remember to limit breaks to five or ten minutes. Lengthy breaks are as distracting as no breaks.

For one-day training sessions, it is helpful to know how much material you can expect to cover before lunch and how much you can expect to cover after lunch. In other words, your lesson plan for a one-day training session should consist of two equal (or nearly equal) halves. The more lesson plans you write and the more training sessions you conduct the better you will become at gauging material and time.

## **How to Prepare a Training Program**

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You can spend hours or days or weeks preparing training programs. These are ideas for the best ways to prepare training programs:

- **Keep things simple.**  
The best way to prepare a training program is to remember to simplify, simplify, simplify. The simplest presentations, demonstrations, group exercises, handouts, lesson plans, and visuals are always best.
- **Involve others in the presentation of the training program.**  
Let others make the prepared charts, write the handouts, type the lesson plans. Let anyone who can and wants to

help you work with you. If you have no volunteers, draft some helpers. Don't be selfish and want to do it all yourself. It will cost you if you do. Always remember to give credit to those who have helped, too.

- Imagine how you would view a program if you were a participant. Remember to plan things you think are interesting ways of covering the material. Let others help you generate the ideas, too! Two heads are better than one, and three or four are better than two.

The secret of a successful training program lies in the planning and preparation. A carefully planned and prepared program will always be effective, but you will have grave problems with any poorly planned and hastily prepared training program. It is very difficult to make a silk purse out of a sow's ear.

## **Preparing for the Training Session Exercises**

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1. Determine what visual illustrations you will use for each major point, subhead, and subordinate subhead. Visuals may be demonstrations, videotapes, films, overhead transparencies, prepared charts, or impromptu drawings on a response chart. Prepared charts are the cheapest and simplest visuals. On separate sheets of plain paper, draw a rough sketch, graph, listing of important points, or other visual ideas. Label these visual ideas as Prepared Chart #1 or Overhead Transparency #1, #2, #3, and so forth. These terms will identify the type of visual and its sequence in your lesson plan. They will also provide you with a working outline for visuals as you begin to prepare the charts and transparencies. Be certain that the terms and numbers you include in your lesson plan correlate to those you have prepared.

2. What handout material will you need for each concept listed on your outline? Prepare the handout material. Label each handout as Handout A, Handout B, or Handout 1, Handout 2, and so forth. If you plan to bind the handouts as a participants' manual, they may be termed Participants' Manual, Page 1, and so forth. Again, these terms will identify the handout or participants' manual page number in the lesson plan.
3. Determine any other materials you will need such as paper, pencils, magic markers, newsprint.
4. Acquire or develop the other needed materials.
5. Write your lesson plan. Keep everything very brief. Include only the most essential remarks.
6. Make a checklist of all materials needed for the training program. Large copier-paper boxes are excellent and sturdy containers for your training materials. The checklist may be taped to the top of the box.
7. Allot an hour for the preparation of each page of written material and an hour for the preparation of each visual. This time allowance will prevent burning the midnight oil unnecessarily.



**C·H·A·P·T·E·R S·E·V·E·N**

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Creating

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*“The secret of education is respecting the pupil.”*  
—Ralph Waldo Emerson

**S**uccessful training programs depend upon many elements: the needs assessment, the training program design, the training materials and methods, and the trainer's skill as a leader and communicator. The trainer's skill as a leader and communicator is often neglected, for teaching leadership and communication skills is far more difficult than teaching someone how to work a film projector. Nonetheless, these skills are integral elements in successful training programs. Creating a learning climate is the most important leadership function required of the trainer. To be successful, the trainer must create a warm, friendly, supportive atmosphere.

A good trainer must be the master of both leadership and technical skills. Too often we teach trainers how to operate the mechanical equipment but fail to teach them the basics of working with other people. Left to their own devices in the sink-or-swim school of training trainers, most trainers try to emulate other teachers or trainers they have known. By merely copying others' leadership styles, they often create weird hybrids. On one hand, they try to be like Miss Sit-Down-and-Be-Quiet, who so impressed them as their omniscient, omnipotent third grade teacher; on the other hand, they try to be like Mr. Hail-Friend-Heartily-Met, who conducted that super seminar they attended last year. Is it any wonder both they and their participants become confused by this schizophrenic behavior? The most successful trainers are those who are comfortable with themselves and respect the integrity of their personalities. These trainers do not try to act like anyone; they are comfortable being themselves.

Good trainers work to develop a warm, supportive learning climate, and they are aware that everything they do influences this learning climate. You can create a “I’m the teacher, and you better not forget it” atmosphere that is cold and distant; or you can create an atmosphere that says, “I’m concerned about your growth and development, and I want to help you.” Your communication skills and your interpersonal relationship skills are obvious climate influencers; not so obvious influencers are your mental and physical health. If you are frightened or bored or hostile or totally unprepared, your participants will soon know this. If you are totally exhausted or sick, your participants will soon know this, too. Creating a good learning climate will depend not only on your being well-prepared but also on your mental and physical well-being.

## **The Learning Climate**

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In developing the learning climate, the trainer works to establish a supportive, friendly relationship with each participant, to discover each individual’s learning needs, and to offer learning experiences to meet each participant’s needs. Some participants will need more emotional support from you than others, but all will need some support and recognition of their individuality. No matter how hostile or self-assured they may appear, they will all respond to being treated with respect and sincerity. To be concerned about the emotional and learning needs of your participants requires that you truly care for them and their well-being. This will mean that you cannot concentrate on yourself or your feelings. Instead, you must be genuinely and totally interested in their growth and development. This self-negation will require the most supreme effort, for we are all self-centered creatures. It will also require extreme honesty

on your part, for faked concern will be obvious and is probably worse than displayed indifference.

## **Steps to Follow in Climate-Building**

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The following steps indicate concrete ways the trainer can establish a supportive learning climate. This climate is as important for the growth of learning as sun and rain are for growing corn. You must nurture your participants' learning growth in the following ways:

- Be sincere, genuine, empathetic, and fair;
- Be enthusiastic and positive;
- Establish your credibility as a knowledgeable person; and
- Foster creativity and learning.

## **Be Sincere, Genuine, Empathetic, and Fair**

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Above all, you must be you. Do not try to be someone you are not. It is impossible to be sincere or genuine if you are playing a role. It is easy to mimic others, but this is not an effective way to establish a reputation for genuineness. Always respond truthfully, but not in a brutally honest fashion. If you think carefully before you speak, you can be both truthful and tactful.

You must also be empathetic. Share your participants' concerns and value their ideas. Support them as they begin to make comments or offer suggestions, and you will soon have the most synergistic training session imaginable. If you can share and support your participants' ideas, everyone will want to contribute to the group, and the sum of the whole will indeed be greater than the sum of any of its parts. When you set yourself up as the only knowledgeable person in the

group, you are destined to have the whole show to run by yourself. If you are empathetic and encourage group participation, you will have a far more meaningful and successful training program.

Conducting a good training program depends upon a strong sense of fairness. In training, it is fair for the participants to do or say anything they please. It is not fair for the trainer to do or say anything he or she pleases. Believe me, the session participants will control each other, and they will not forgive a fellow participant for attacking the trainer. They also will not forgive a trainer who attacks. If you are ever (God forbid) attacked, assume all the blame. You may be totally blameless, but you must be ever so apologetic.

For example, you must respond very carefully if someone unjustly accuses you of some farfetched, ridiculous something such as insulting the group's intelligence. This unjust accusation might come flying at you out of nowhere and be worded like this: "You must think we're complete idiots. I can't imagine any of us even thinking—much less doing—such a moronic thing as you're suggesting we might without the benefit of your excellent (heavy sarcasm here) guidance." This is a two-fold attack. Your comment and your ability are both under attack. Follow these steps in replying:

1. Take a deep breath. You may even count to ten.
2. Apologize. This is important. I know and you know that you have nothing to apologize for, but do it anyway.
3. Explain *you* must have not stated things very well for such an impression to have been given. Indeed, perhaps you did not communicate very well.
4. Maintain staunchly that you'll work to prevent this happening again. Encourage the group to let you know if you err again, and remember Alexander Pope's line, "To err is human, to forgive divine."
5. Ask the obstreperous soul who has maligned you to talk with you during the next break. Try to become friends.

Notice what you've accomplished here. You have absorbed the vitriolic attack without counterattacking (that could have led to an all-out war), and you've made the insecure wretch feel important by asking his or her help in overcoming your inadequacies. You have shown respect for the feelings of others, and this is one of the key characteristics of good trainers.

In any training session, you will always find yourself naturally drawn to two or three participants. Do not make them the center of your attention. It will be easy to talk only to them, and it is comfortable to surround yourself with a small group of like-minded participants, but doing this will not be fair to the others. Do not allow yourself to be constantly surrounded by a select coterie. A good trainer belongs equally to the entire group. This means a good trainer encourages all participants to express their views during group discussions rather than always seeking the views of a select few. A good trainer also talks with everyone during breaks and lunch. This requires constant self-monitoring, but it ensures group camaraderie which is essential. A group spirit prevents "us against them" problems and aids the learning process.

## **Be Enthusiastic and Positive**

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Always show enthusiasm and regard for your learning methods and materials. If you don't believe the training session will produce super learning, it surely won't. If you feel you have created the most wonderful training program, your enthusiasm and belief in your product will convince others of its worth. For instance, if you say, "This is a rather dumb exercise," it surely will become one. Often we feel we must belittle ourselves, our knowledge, or our training materials. It is all right to feel this way. A little fear and trepidation is normal, but you must resist the impulse to

show anything but supreme confidence in your abilities as a trainer. This does not mean you should become an obnoxious braggart, but it does mean that you should be quietly self-confident.

If you do happen to be struck by stagefright, be happy and relieved. If you didn't feel any tingling or concern, you would surely present a dead training program. Many excellent actors and actresses feel a bit of stagefright. If they can be afraid, why can't you? Some trainers overcome their stagefright by beginning a training session with participant introductions. Then they grip firmly both sides of the podium or dig their fingernails into the palms of their hands. Slowly, they begin to speak and give instructions for the participants to follow as they introduce themselves or each other. This removes them from center stage for a short while and helps them to get control of themselves. Of course, this will not work if the group is very large, for one cannot spend hours on introductions. If the group is too large for introductions, many trainers begin with a story (it may be a humorous anecdote or an illustration of the topic to be covered in the training session). The story is one that they know very well and have told numerous times successfully. If you are so unfortunate as not to have a collection of stories, use your library or ask your friends for their favorites. Telling a story or anecdote creates interest, and it is an easy first step to take.

Always speak in positive terms, tell positive stories, and use positive examples. Most important is to think positively about your participants and yourself. Never be guilty of saying anything like "You'll have some trouble learning this next step." Instead, say, "This next step will require some concentration and work, but it will certainly help you to do \_\_\_\_\_." Always stress the benefits of any learning situation, and always comment positively on each individual's success. Each participant deserves at least one positive comment

from you directed specifically at him or her. If you believe your training program is good and that the participants will learn from it, they will.

## **Establish Your Credibility as a Knowledgeable Person**

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In addition to building a climate of mutual respect and concern, you must also establish your credibility as a knowledgeable person. Your credibility hinges not only on your concern for the participants but also on your knowledge or competence. Just as good supervisors should be able to perform all the tasks they supervise, good trainers should be able to perform the tasks they train others to perform. You do not have to be the world's expert, but you do have to know your subject. Always admit your errors or mistakes. Apologize for them, but do not grovel. Also don't make excuses for yourself. If you make a mistake, try to rectify it as soon as possible. Hoping no one will notice is both foolish and dishonest. Never "make up" an answer to a question. Often this will be tempting, but yield not!

## **Foster Creativity and Learning**

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A successful training program will accommodate individual needs and concerns; it will relate the training to these needs; and it will also create a learning atmosphere charged with energy and creativity. We can do many things to block creativity—some of which we might mistakenly think are essentials of "good" training programs. The following are examples of ways trainers often make learning very difficult: We hinder learning by

- Forcing work to fit a preconceived structure,
- Paying too much attention to technique at the wrong time,



- Setting expectations too high,
- Evaluating too soon,
- Taking too little time to play, and
- Talking before listening.

Both creativity and learning increase when the trainer concentrates on learning rather than teaching and remains flexible about the learning process.

## **Subliminal Climate-Building Messages**

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Subliminal messages are very strong and very persuasive. A trainer sends a multitude of subliminal messages—either consciously or unconsciously—that greatly influence the learning climate. An awareness of these messages will help you to eliminate negatives and accentuate positives. The following represent the most obvious and easily controlled subliminal messages:

- Room arrangement,
- Participant groups,
- Use and control of time, and
- Trainer's appearance.

## **Room Arrangement**

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Your training room arrangement and appearance can make any of the following statements:

- “This trainer really believes in a rigid set-up.”
- “This room looks like the morning after the night before.”
- “Somebody has spent a lot of time getting ready for this session.”
- “This looks like fun.”

A professional approach to training requires a professional approach to room arrangement. Room arrangements may

be either formal or informal. The size of the group to be trained generally determines the formality of the room arrangement. Large groups tend to require a more formal approach, and small groups tend to be more informal. Large groups may, however, also be trained in an informal manner with informal room arrangements.

Informal room arrangements allow the participants greater freedom of movement and expression. If participants are seated in rows or behind tables, the arrangement is considered formal. If the participants are grouped casually in small clusters, the arrangement is considered informal. Formal arrangements work best when the trainer is presenting new knowledge or skills; informal arrangements work best when the group is assimilating the knowledge and practicing skills. A table or podium for the trainer creates formality. If the trainer stands behind these, he or she has more control of the learning situation. If the trainer moves from behind a podium or table and sits with the group, the learning situation becomes informal and the trainer shares control of the group with the participants.

The following room arrangements are representative of the three most common types of formal room arrangements:

- Theatre style,
- Classroom style,
- Conference style, and
- Informal, discussion group style.

## **Theatre Style**

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Theatre style room arrangements have no tables. The chairs are usually placed in rows with a center aisle. This arrangement works best for large groups of forty to several hundred.

## Classroom Style

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Classroom style room arrangements have both tables and chairs. The tables are usually placed in rows. This arrangement works best for groups of fewer than forty participants. Classroom style is useful for presentations, demonstrations, and some types of group learning.

## Conference Style

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Conference style room arrangements have both tables and chairs. This arrangement works best for groups of twelve to sixteen. For groups larger than twenty, the classroom style may be best. Conference style rooms are ideal for seminars and workshops. The arrangement of the table(s) may be as follows:

**U-Shape**

This arrangement allows the trainer great freedom of movement. It works best with twelve to sixteen people.

**V-Shape**

This arrangement also allows the trainer great freedom of movement. It works best with fewer than ten participants.

**Conference Table**

This arrangement is useful for group discussions in groups of ten to twelve. This is an excellent arrangement for group problem-solving.

**Closed Square**

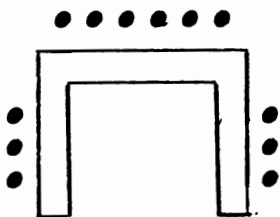
This arrangement is useful for larger group discussions with twelve to twenty participants.

**Herringbone**

The herringbone arrangement combines the classroom and the v-shape arrangement. This arrangement allows the trainer greater freedom of movement than the classroom arrangement, and it works well with groups of twenty to thirty.

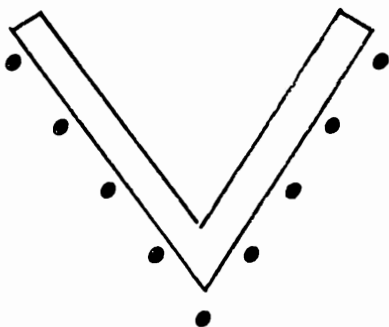


*U-Shape example:*



o *V-Shape*

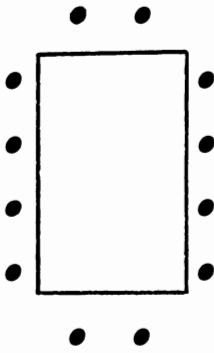
*V-Shape also allows the trainer great freedom of movement. This arrangement works best with fewer than ten participants.*



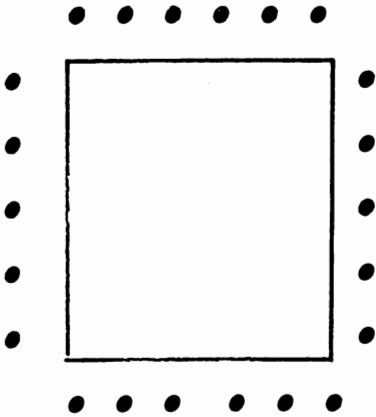
o *Conference table*

*This arrangement is useful for group discussions in groups of ten to twelve. This is an excellent arrangement for group problem solving.*

*Conference table example:*

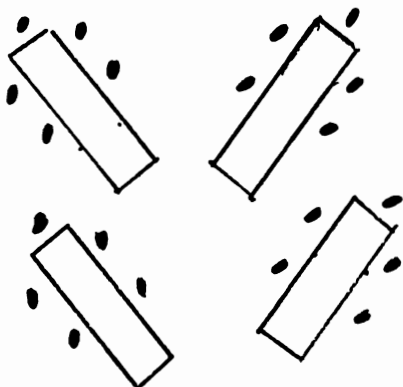


- o *Closed square*  
*This is useful for larger groups to use in group discussions with twenty participants.*



o *Herringbone*

*Herringbone is a combination of the V-Shape and the classroom arrangement. It works well with groups of about twenty. This arrangement allows the trainer greater freedom of movement than the classroom arrangement.*



- o *Small, informal discussion groups*  
*With any style of room arrangement. Participants may move their chairs to form smaller, informal groups. With a large number of participants this may become a bit noisy, but that's quite all right.*

## **Informal, Discussion Group Style**

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With any style of room arrangement, participants may move their chairs to form smaller, informal groups. With a large number of participants, this may become a bit noisy, but that is quite all right.

## **Participant Groups**

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Participant groups also reflect the formality or informality of the learning climate. Obviously, formal room arrangements will lead to formal participant groups and informal room arrangements will lead to informal participant groups. The following terms are commonly used to denote the organization of participants. Most are rather obvious terms.

### **Pairs**

Pairs are sometimes called dyads—a rather pedantic term. Pairs are groups of two participants working together.

### **Trios**

Trios are sometimes called triads—also a rather pedantic term. Groups of three participants working together are called trios.

### **Small Groups**

Small groups are groups of from four to ten participants. More than ten becomes a bit larger than small. Six participants constitute the most effective small group size.

### **Total Group**

The entire group of participants works together.

To form groups of equal numbers of participants (or nearly equal) requires that you understand how to count off to form groups. This may seem rather obvious, but experienced trainers have had problems doing it before.



### □ **To Form Pairs**

To form pairs, you divide the number of participants by two. Then you count up to one-half the number of participants. For example, if you have twenty-four participants, half of twenty-four is twelve. Count off up to twelve; then begin to count off up to twelve again. The one's form a pair; the two's a second pair, and so forth.

### □ **To Form Trios**

To form trios, you divide the number of participants by three. Then you count up to one-third the number of participants. For example, you have twenty-four participants. Twenty-four divided by three is eight. Count off to eight, three times. The one's form a trio, the two's a second trio, and so forth.

If you have a number that is not evenly divisible, don't play Solomon. Instead, make one or two larger groups or one or two smaller groups. You, as the trainer, can participate in the group that needs one extra person. Some trainers do not like to do this, for they use the time during the group exercises to plan ahead, evaluate what has gone before, help the participants with the group exercise, or just plain rest.

When you have groups count off, always start in a different place so that people do not end up in the same pairs or groups. After the group has divided into small groups several times, you may merely tell them to form small groups of three and work with people they have not worked with yet.

Having participants work with others (and not those whom they choose as buddies) soon leads to a warm group spirit that can scarcely be developed otherwise. If your participants represent a number of separate organizations or if they represent the various segments of one organization, divide them into randomly chosen groups very early during the training session. This is the best way to eliminate divisions and create unity.

## **Use and Control of Time**

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The element of time in a training session is a strange thing. The successful trainer both controls and ignores time. The most meaningful training sessions will allow time for everyone to grasp an idea or concept or skill. This means that a one-day training session may cover only half the material the trainer prepared, and that's quite all right. It does *not* mean that the participants must forego asking questions, practicing skills, taking breaks, or eating lunch to cover the material the trainer has mandated will be covered. (Now if the head honcho has mandated the amount of material to be covered, that may be a horse of a different color.)

The trainer respects the participants' time by beginning exactly on time and stopping exactly on time for breaks, lunch, and final evaluations. A good trainer begins with warm-up exercises (that relate to the training program) and introductions which create a good climate for learning and also allow late-comers to catch up easily. After breaks and lunch, the trainer summarizes the material covered before the group left the training room. This again allows late-comers to catch up easily. It also provides a thread of continuity between segments of the training. Notice that the introductory exercises and summaries are not dead time. They are essential elements of the training session. All sessions should begin with a climate-building introductory exercise, and summaries provide much needed transitions for the learners.

## **Your Appearance and Manner**

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As the participants first enter the training room, your appearance and manner also send strong messages. If you

ignore the participants as they enter, you are saying neither they nor the amount of learning this session will produce are important to you. It is often very difficult to be cordial and to begin to work on establishing rapport with the early bird who arrives forty-five minutes early. Here you are, frantically trying to duplicate the wonderful room arrangement you so laboriously set up yesterday that the cleaning crew so methodically destroyed. How can you be genuine and concerned when you are frantic and angry? It's not easy, but it must be done. Stop. Smile. Introduce yourself and chat away until someone else arrives; then introduce the two early birds to each other and leave them to their own devices. Or better yet, always have refreshments (coffee, soft drinks, or only water—if your budget is *very* tight) set up first. No matter if the room has become a shambles, get the refreshments first and greet all early arrivals with warmth and friendliness.

Your appearance sends many, many messages. The best guides to appearance are John T. Molloy's books, *Dress for Success* and *The Woman's Dress for Success*. Many *au courant* fashion-setting professionals now feel his advice is a bit stuffy. Perhaps it is, but if you follow his advice, you will never go wrong. If you read the fashion magazines and rely on them, you might. Remember that the fashion magazines exist to sell clothes; John Molloy wrote to help you become more successful. Above all, dress professionally. Even if the training session is at a state park and the attire is casual, be a professional-looking, casually dressed trainer. Neatness, color, and fit of casual clothes can create a casual but professional image.

After reading all these prescriptions for effective climate-building, you may be a bit intimidated. Don't be frightened. Be assured that if you are an honest, sincere, well-prepared trainer who puts concern for participants foremost (even before self-concern), your training session will have a climate which will ensure both trainer and participant growth.

## ■ **Creating a Learning Climate Exercises**

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1. Have a close friend (one who can be totally honest with you and still remain your friend) observe your training program and critique the following points:
  - a. Sincerity, genuineness, empathy, fairness;
  - b. Enthusiasm;
  - c. Positive attitude and statements;
  - d. Knowledge of subject;
  - e. Support of participants' creative ideas—those the trainer had not necessarily considered before;
  - f. Room arrangement;
  - g. Use and control of time; and
  - h. Total physical appearance and manner.
2. Ask this wonderful friend to write down examples of specific behavior so that you will know exactly what you have done that was either good or bad. Be certain to have them give you examples of both the good and the bad. Ask them to go easy on the bad examples until you have gained experience and confidence. Then, they can let you have it with both barrels.
3. Plan to strengthen your weaknesses. We learn by doing, and we can profit from our mistakes.

**C·H·A·P·T·E·R E·I·G·H·T**

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**Communication**

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**Skills**

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**for**

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**Trainers**

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*“It is not of so much consequence what you say, as  
how you say it.”  
—Alexander Smith*

**A**ll good trainers concentrate on improving their communication skills. Communication between trainer and participants depends not only upon the trainer’s ability to express ideas clearly but also upon the trainer’s ability to understand the participants’ ideas. Good communication involves an exchange of thoughts between the trainer and the participants. Neither the trainer nor the participants control the communications process, but both contribute equally.

We often think of training session communications as lines with a beginning and an end, and we see the trainer on one end and the participants on the other. We visualize the trainer as the only one with the message and the only one who communicates. In reality, the communications in a good training session involve a series of exchanges involving both the trainer and the participants. These exchanges should resemble a helix; in other words, they should spiral with the purpose and objectives of the training program as the core of the spiral. This active communications process requires equal responsibility and participation from both the trainer and the participants.

Either the trainer or the participants may begin the communications process, but both are obligated to continue the process once it has begun. If the trainer begins the communications process, the initial step may be either a question or a statement. The participants listen and observe. Then the participants or a representative participant states or questions with the trainer listening and observing. The trainer then may state another view, restate the original

view, or question the participants to gain further information. Good communication involves a consideration of everyone's views, ideas, and questions. Good communication is a polite sharing of concepts and exploration of ideas.

There are five communication skills that the trainer needs. These skills form a solid foundation for good communication with participants in a training program. Trainers with excellent communication skills will be able to

- State ideas clearly and concisely,
- Listen,
- Ask questions,
- Give feedback, and
- Observe and understand nonverbal communications.

### **Communication Skill Number One: State Ideas Clearly.**

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All communication in a training program has one objective: to promote understanding. The trainer is totally responsible for presenting information so that the participants can understand not only the thoughts of the trainer but also the thoughts of the other participants. Muddled thinking will lead to muddled communication. Sort-of-kind-of thinking confuses everyone. It is often difficult to think clearly; it is even more difficult to help others think clearly. This, however, is the most important communications skill. It is essential to have clear, precise, well-considered thoughts. It is also essential to help participants organize their thoughts in a clear, precise, and concise fashion.

#### **Use simple, natural language.**

You state your ideas clearly when you speak naturally. Anytime you try to impress others with a fancy vocabulary or convoluted (how's that for fancy?) thought pattern, you merely obfuscate matters. This statement means that any

word that is obscure and any tangled sentence will hinder or prevent good communications. See what the words *obfuscate* and *convoluted* do to that sentence. Although you may love esoteric, pedantic words and complex sentence structures, avoid them like the plague when you are training others. Your object is to communicate clearly, not to impress others with words and ideas they cannot understand.

In both your writing and speaking, use active voice verbs and a subject, verb, object sentence pattern. Tell people clearly who did what, what switch turns on the machine, and how they can do whatever their jobs require. Keep the subject, verb, and object as close together as possible. Add the modifying phrases and clauses at the beginning or end of the central thought. Practice in using the active voice will greatly improve your communication skills, and an elimination of all but the necessary thoughts will prevent confusion.

The central, underlying idea of every communication should be extremely simple and obvious. In fact, it may be so obvious that you feel it is unnecessary to mention it. Never take the central idea or thought for granted. It may be extremely obvious to you, but to your participants it may be as clear as mud. The one, simple, controlling idea of every segment of the training program should be stated and restated. Never assume that everyone already understands anything. In every successful communication there must always be a controlling idea; and this central, controlling idea must be clearly stated—not once, but many times.

Avoid trying to say too much at one time. The Hungarian mathematician George Polya, a master of clear thinking and clear expression, stressed the importance of mastering these two rules of communications style: “The first rule of style is to have something to say. The second rule of style is to control yourself when, by chance, you have two things to say; say first one, then the other, not both at the same time.” When we find we have many ideas to communicate, we often



try to condense the message or to speed the process by combining thoughts. This may lead to confusion. Explaining the relationship or connection between ideas is essential, but combining two ideas is confusing to most participants. Always evaluate any condensation or combination of ideas for clarity of purpose and expression.

Consider also the rate at which participants can receive and retain information. Children always need to be told three times what they are expected to do; often times adults need to hear instructions three times, too. Speed is highly valued in today's world, but often the communications process is not effective at supersonic rates. Communication, not speed, is the priority.

It is also important to know to whom you need to communicate. Harold Nicolson, the British diplomat, expressed this idea as a communication essential: "The first essential is to know what one wishes to say; the second is to decide to whom one wishes to say it." The trainer must decide what the participants need to know. It is a grave mistake to burden participants with information they will not or cannot use. Consider your participants' true needs and focus on communicating to meet those needs. Nice-to-know, but irrelevant, information will hinder the communications process. Always consider what the participants truly need to know and plan your communications to meet these needs.

□ **Use easily understood, valid examples.**

Stories, examples, or parables always aid the participants' understanding of abstract ideas. Always try to think of examples to illustrate each concept or point. For example, it is a well-known motivational concept that people will perform well if good performance gives them rewards. The difficulty lies in understanding what people feel are rewards. You would not give opera tickets to a country music fan and expect the country music lover to see these opera tickets as a reward. These tickets are concrete examples, and they are

representative of “rewards” everyone can visualize and identify as something that would have great reward value or little reward value. This example clarifies and illustrates an abstract idea. Examples, stories, and parables give participants concrete illustrations of abstract concepts and promote good communication.

If you have difficulty in thinking of good examples, ask your participants for their ideas. You can have participants create examples merely by asking each individual to give an illustration of what he or she would consider a reward. Then you can have the participants list “rewards” they received that have been punishments in actuality. It is important to use meaningful examples, and it is equally important to check the validity of these examples. Be very careful in giving examples not to be critical of any of your participants. Be extremely careful when making value judgments. Notice that the example of “rewards” does not place a higher value on either opera or country music. Always avoid value judgments unless the values relate directly to a concept you are discussing and unless these values are necessary.

Think carefully about the implications of any story or example used to illustrate concepts. Steer away from any political or religious comments. Use yourself as the subject in stories or examples which illustrate the wrong or negative example. Of course, always tell why and how you have learned from your mistakes. Carefully chosen and easily understood examples will help participants learn; poorly chosen examples will confuse and prevent learning.

□ **Provide verbal and visual roadmaps for participants.**

Always give participants a verbal and visual outline to help them follow your thoughts and statements. Always begin a training session by stating the purpose of the training and the learning objectives. Allow time for participants to state their objectives. Then, clarify that you and the participants

have the same goals and objectives in mind. Begin by telling the participants what changes in knowledge, skill, or attitude they will undergo and conclude by showing them how they have changed. Always give reasons for everything you say and everything you do. Provide transitions or connections between the various sections of the training program. For example, say, "First, we'll discuss how you plan for organizational change. Second, we will demonstrate how you can accomplish organizational change most efficiently and effectively." After the first segment of the training (planning for organizational change), conclude that section and connect with the second section by saying, "Now that we understand the steps to take in planning for organizational change, let's examine how we can implement these steps." Statements that introduce, connect, and conclude all parts of the training session should be frequent, clear, and specific. Always have before the participants an outline to which you frequently refer and a prepared chart which summarizes or lists key points of that training segment.

Always relieve your participants' suspense about what you are going to do next, provide transitions to help them move smoothly from one topic to the next, and summarize to conclude each section. In other words, you simultaneously introduce a new topic, connect it with the preceding topic, and conclude the previous topic. This may seem to be a waste of time; but introductions, transitions, and conclusions aid the participants' understanding and help them to learn.

#### □ **Avoid assumptions.**

False assumptions will cause your most serious errors. Of course, everyone should think as you think, but few do. *Never assume anything!* Be certain that both you and the participants understand clearly by paraphrasing their remarks to test your understanding. For example, if a participant says, "I would *never* do that," the *never* may have two entirely different meanings. The *never* may mean never ever; or it

may mean, “I do that all the time.” Learn to restate what you think you have heard or understood. Let the participant reassure you that your assumption was correct and then proceed. This will keep you from making a complete fool of yourself.

□ **Avoid all off-color remarks, displays of anger, and offensive humor.**

Avoid references to anything that could be taken as a *double entendre* and never use any off-color remarks or humor.

There will be times when you will want to swear like a sailor, and there will be either participants or equipment which will deserve all manner of oaths. Don't allow yourself the luxury of venting your anger or frustration by saying anything. Just keep your mouth shut. The best communication is often complete silence. Control your tongue.

Humor always creates a relaxed, comfortable learning climate—but only if it is well-considered beforehand. Avoid the impulse to become a comedian if you have not carefully considered that spontaneous, funny remark that has just popped into your head. Never, never make a humorous statement about one of your participants or about their organization. You may laugh at yourself, your family, and maybe your former boss (consider this carefully, too); but you may *not* laugh at your participants. Even the most light-hearted, innocent comment can be misconstrued, misinterpreted or misquoted. Avoid creating opportunities for this to happen.

## **Communication Skill Number Two: Listen Actively.**

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Listening is an acquired skill, not a natural function. Listening is not to be confused with hearing. We hear without

exerting any effort. We can sit passively and hear a multitude of sounds, but we must exert ourselves when we listen. To listen, we must not only hear but also attend to the sounds. We must pay attention; we must think; we must put someone other than ourselves at the center of our thought processes. This hurts. We like to think of ourselves, and we like to think about our thoughts. The intrusion of others' thoughts forces us off center stage. This can be extremely painful for self-centered people. Since we are all basically self-centered, we usually fight this intrusion by refusing to listen. Listening is a complex, acquired skill which is seldom taught. Listening is generally a misunderstood, little considered, but very necessary communication skill.

□ **Listening is more than keeping your mouth shut.**

We often confuse listening with keeping our mouths shut. In reality, listening and keeping our mouths shut are two entirely different activities. It is a common misconception that good communication is an activity involving people who politely wait for others to finish talking about themselves so that the listeners can have a turn talking about themselves. We feel listeners are passive and inactive, patiently waiting for their turn. Although this may describe poor listeners, it certainly does not describe good listeners. True communication requires an active, involved role on the part of both the speaker and the listener.

□ **Listening is an acquired skill.**

We seldom think of listening as an acquired skill. Instead, we regard listening as a natural, inherent trait or talent—some skill we were born being able to do as well in infancy as in adulthood. We are taught how to speak; we are encouraged to become better speakers; and we are praised for our speaking abilities. We are not taught how to listen; we are seldom encouraged to become better listeners (but often scolded for not being good listeners); and we are seldom praised for our listening abilities.

□ **Listening requires the listener to think about others.**

We are all selfish people. Man's self-centered nature is the original sin; it is also a deadly sin. We like to talk because it is ego-gratifying; we feel both good and important when we are talking. We feel even better when people listen to us with rapt attention and convey to us through both their body language and appropriate comments that they have understood our message. We, however, do not like to listen. In fact, we go so far as to carry on conversations with ourselves while pretending to listen. We revert naturally to our self-centered role when placed in the position of the listener.

□ **Listening has a negative connotation.**

We often view listening as a boring, unpleasant activity—a negative, “have-to” experience. We associate listening with these negative messages: “Sit down and listen,” or “Why don't you ever listen?” Too often parents and teachers fail to reward children for good listening; instead, they punish children for *not* listening. This creates a negative concept of listening and causes the child to decide that “no one can make them listen.” Your participants will often feel very negative about listening to you; consequently, you should plan for little lecturing on your part and much discussion involving them. All these negative views of listening are commonly held prejudices which reveal our total ignorance of the nature of listening.

□ **Steps in the Active Listening Cycle**

For any meaningful exchange of thoughts or ideas, one must learn to listen actively. Active listening is a concept first introduced by Carl Rogers as a tool to be used in psychological counseling. When you consider the amount of money some people pay to have others merely listen to them, you begin to get an idea of how valuable this skill can be for you. The following steps complete an active listening cycle. Of

course, the cycle may continue to revolve. More revolutions equal more communication.

□ **Step One. Remain Neutral.**

To remain neutral, you must refrain from making any judgments. You merely listen. You absorb what is being said. You do not give advice, criticize, interrupt, agree, or disagree.

□ **Step Two. Give the Speaker Your Complete Attention.**

Not only must you give your complete attention, you must physically and verbally show that you are listening by nodding your head and making encouraging noises such as "Yes," "Un huh," or "I see," "I understand," "I hear you." These encouraging statements may indicate agreement or merely state that you are indeed listening.

□ **Step Three. Restate the Speaker's Main Point.**

Restating the major points is a crucial part of the listening process. This restatement prevents faulty assumptions and allows the speaker to reconsider, evaluate, and perhaps add to your understanding. It may even cause the speaker to rethink statements that now sound a bit funny coming from someone else.

□ **Step Four. Get the Speaker's Agreement.**

Do not proceed to another topic until you and the speaker agree that what you heard was indeed what the speaker meant. Once the speaker agrees by saying something such as "Yes, that's what I think, feel, understand, or know about this subject," then you may present another idea, concept, or question. Do not proceed to another topic until you and the speaker agree that what you heard was indeed what the speaker meant.

You will find yourself learning a great deal about your participants' ideas and feelings if you practice active listening and combine the listening skill with skillful questioning.

Questions should always aid the communications process in a training program.

### **Communication Skill Number Three: Ask Questions Skillfully.**

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Questioning is perhaps the deadliest communication skill in the communication tricks bag held by obnoxious, intimidating trainers. Nothing goes for the jugular vein with quite such deadly aim as a question that only the trainer can answer. Such naked power! Intimidating, antagonizing, or embarrassing questions should be outlawed and punished severely. Often trainers play “Twenty Questions” by asking for specific responses known only by a select, small, closed group or perhaps known only by the all-powerful trainer. Never be guilty of this. When you ask questions of the group (often called overhead, key, or general questions), phrase them so that someone somewhere in the group will be able to answer them. The following guidelines should help you to ask meaningful questions:

□ **Vary the way you distribute questions.**

You can ask each participant to respond to a general question such as “What is one characteristic of a good trainer?” This is often called a relay question. If the responses begin to slow or if no responses are forthcoming, ask another general question to encourage participants to respond. Many people are cautious and fearful of responding to trainers, for they have been embarrassed or humiliated by one of the power-monger types. As they learn that you have no desire to do anything but help the participants learn and share ideas, they will contribute to the discussion freely. You may then need to skillfully direct questions to those whose experiences will be helpful for the entire group or to those who have not been a part of the discussion.

You can ask a specific (often called a directed question),



but be fair and give the participants ample warning by calling their names and telling them you'd like for them to share their views, ideas, and comments. Call the name of the person *before* asking the question. Give the participant fair warning. Don't play Powerful Pacing Professor who suddenly halts in mid-step, points a gun or a finger, and fires off a question. All brave souls who respond to your questions should be rewarded for their daring. Be flexible enough to adjust to almost any response except one that will totally mislead the group. For these responses, allow the responder to amplify and gracefully back out of a totally incorrect response.

□ **Ask clear, relevant questions.**

If no one answers your question, assume this reticence is your fault. The question may be ambiguous or not clearly stated. Restate the question until someone begins to get a glimmer of your meaning. Don't ask questions just to wake up those who are getting sleepy after lunch (although questioning does tend to wake people up—unless you let the same ones answer all the time and unless you allow a floor-hogger to talk on and on and on). Make the questions an integral part of your lesson plan. Think carefully as you design the training program and allow every natural opportunity for participant comments.

□ **Positively reinforce participation.**

Acknowledge all responses. If the answer to a question seems to make no sense, ask another question to clarify the response. If the answer is clearly wrong, wrong, wrong, you may ask for clarification, or you may say, "That's an interesting response, not quite what I expected, but interesting. I will have to think about that for a bit. Would anyone else like to give us his or her thoughts on this?" Perhaps you as the trainer can help the participant re-word the response so that it will have meaning. When a responder is giving a good answer, nod your head to encourage this show of bravery

and wisdom. Tilt your head to one side as you listen to the responses to your questions; this will cause you to appear totally interested in the answers.

□ **Ask open questions.**

Closed questions require very short, usually one-word answers—often *yes* or *no*. Closed questions solicit no additional information. They do not aid communication; they merely solicit information. Open questions require more than one-word answers. They ask for reasons, explanations, and ideas. Open questions begin with words like *what* and *why*, and they clarify for us the thoughts of others. Open questions aid communication and eliminate confusion. The introductory words *who*, *what*, *when*, *where* will elicit factual information. *How* questions require some background experience. *Why* questions help participants to analyze causes. *What if* and *what could* questions help participants to project and speculate.

□ **Respond to participants' questions.**

Questioning is a tool for both the trainer and the participants. You can ask questions; and the participants can ask questions, too. You should encourage participants to ask questions whenever they feel the urge. In fact, encourage them to interrupt with questions whenever they do not understand or whenever they want to pursue a thought. Responding to questions is one of your major functions as a trainer; and it is not difficult—if you have done your homework. The following guidelines should help you respond to questions.

□ **Respond seriously to all questions.**

No matter how obvious you feel the answer may be, never respond flippantly. Always respect the sincerity of the questioner. If the question is obliquely related to the subject at hand, respond and guide the discussion back by summarizing and restating points being covered before the question arose.

**Reply to the question that is asked.**

Do not evade the subject; answer the question. If you do not know the answer, say you do not know. Never make up an answer to a question you cannot answer. Offer to find the answer; make a note to remind you to locate the answer; and reply. You can ask if any of the participants has an answer, and if you and they have no answers, ask them to help you find the answer.

**Repeat the questions.**

When you are asked a question, repeat it so that everyone can hear the question and so that you can have time to frame an intelligent response before forging ahead. Our immediate impulse is to answer quickly, but this often causes us to give poorly considered answers. You may write the question on the response chart to give you more think-time. Asking the entire group for their opinions or comments will help you to clarify how you feel—if the question seems perplexing.

Asking non-threatening questions and allowing others to question you help create a healthy learning climate, encourage participation, and make a training session far more meaningful. A good training program design will plan for questions, and a good trainer will encourage spontaneous questions. All questions should relate to the purpose and objectives of the training program, and the questions and their answers should help the learning process.

## **Communication Skill Number Four: Give Feedback.**

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Good training programs allow the participants to apply the knowledge they have gained, practice the skills they have attained, and demonstrate the attitudes they have acquired. Exercises and practice sessions will often include self-evaluation; and with clearly stated objectives, the partici-

pants will be able to evaluate their performance. The trainer, however, must always be able to give the participants accurate, helpful feedback. Feedback that is immediate, specific, individualized, and positive is most effective.

□ **Immediate feedback.**

Immediate feedback is most effective. Imagine how you feel when you work very hard to develop and conduct a meaningful training session. When would you want someone to tell you that you have done a good job? Of course, it is always heartening to hear words of praise, but you really feel cheated if no one immediately rewards your efforts. Letters that arrive two weeks after the training program and praise your accomplishments are certainly appreciated; but warm, appreciative comments at the conclusion of the training program provide the most reinforcement. Imagine how you would feel if all the participants left after the training program without one word of appreciation or thanks for your efforts. Would a congratulatory letter two weeks later completely remove that dull feeling? Participants, too, like to hear how well they are doing right away.

If you wait an hour, a day, or a week before telling participants that they are performing well, they may have already decided that their course of action was futile. By that time, they may be doing something altogether different from the action you think you are reinforcing with your tardy feedback. Reinforce good behavior or proper actions with immediate, positive feedback. This will be the most effective time for giving feedback, and the results of immediate, positive reinforcement will be longer lasting.

□ **Specific feedback.**

Specific feedback is most important. If you merely say, "You are doing a good job," the participant does not have the foggiest notion what you mean. Instead, you should say, "In the last role play, you were most effective when you clearly explained to Jane the sequential steps in correctly complet-

ing this form.” Now the participant knows exactly what performance you are reinforcing. Always specify exactly what is being done that is acceptable or good performance.

□ **Individualized feedback.**

At times, you will want to comment on the behavior of the collective group. This is quite all right. You must, however, also comment on each individual's performance at some time during the training. Each participant must receive from you some individualized feedback, for this will have the most import. Remember the individualized words of positive reinforcement you have received from teachers or trainers. Are not these comments held near and dear to your heart and remembered each time you perform that once praised action? Individualized recognition has the greatest value in shaping behavior.

□ **Consistent feedback.**

To thoroughly confuse participants, first praise them for a certain action and then later criticize them for the same action. This is much like “bragging” to a neighbor (in the child's hearing) that the child certainly was very creative with the paint he found in the basement, and then later, scolding the child for painting “creatively” on the living room walls. The child becomes completely confused. Often trainers do this unconsciously (as do parents). They relate a humorous story illustrating how a volunteer once confused the records by incorrect filing, and immediately try to emphasize the importance of filing the records correctly. They have given an inconsistent response to a desired action. They have on one hand found the undesired action humorous and important enough to relate to the participants. This in itself gives the action positive value. Then, on the other hand, they immediately seek to reverse this value and make incorrect filing a deadly sin. Is it any wonder the participants become confused?

Establish clear priorities before you use stories and anec-

notes. The stories and anecdotes should amuse, but they also should illustrate the desired behavior. Be consistent in both what you say and do, and be especially aware that everything you say or do constitutes feedback of some sort. Inconsistency on your part will create schizoid participants, and their behavior will reflect this schism.

□ **Positive feedback.**

In giving feedback, it is crucial to maintain a delicate balance between the positive and the corrective. The proportions of 3:1 are well-balanced. For every three positive statements regarding performance, one corrective statement will have meaning and justification in the ears of the receiver. In commenting on a role play, you might comment as follows:

“You followed the active listening steps very well, and it was most effective when you asked John why he felt the fundraising drive was not very effective. Your efforts to clearly understand exactly what he meant by *not very effective* prevented a false assumption on your part. Now to increase your skill, practice interjecting some verbal and nonverbal encouragement to the speaker. Try nodding your head and interjecting comments such as ‘I see’ or ‘I understand.’ ”

This is an example of three positive comments and one comment designed to improve performance in the next role play.

Notice the absence of the word *but*. *But* is the most negative word in the English language. If the trainer had followed the positive comments about the role play with a *but*, all the positive remarks would have been completely eliminated by the use of that one word. Avoid using the word *but* at all costs. Substitute the word *now*. *Now* implies a forward-thinking, forward-moving approach and does not negate all the positive statements preceding it. Positive feedback rein-

forces behavior and causes participants to continue to perform in the preferred manner.

All types of feedback encourage participants and reinforce behavior. Without feedback, participants will be forever in a fog. They will have no idea what the trainer thinks of their performance, and any attempts to improve performance will be stabs in the dark motivated only by their gut feelings or by comments of other participants in the training program. The trainer is responsible for giving feedback to all participants that is immediate, specific, individualized, and positive. This feedback will reinforce good performance and help to correct poor performance.

### **Communication Skill Number Five: Observe and Understand Nonverbal Communications.**

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Good trainers are skilled in both verbal and nonverbal communications. Your ability to communicate with participants will increase as you learn to observe and interpret the body language of participants. You should also be aware of the communications signals you send with *your* body language.

You and the participants may send and receive scores of feelings and impressions without uttering a word. Our nonverbal communications can be either conscious or unconscious revelations of our innermost thoughts and feelings. While we can be unconscious of the messages we are sending, the receivers can also be unconscious of the messages they are receiving. As Sigmund Freud observed, "The unconscious of one human being can react upon that of another without passing through the conscious." We often interpret the emotional state of others in this way. We have often "felt" that someone was angry or disappointed or hurt or happy without verbal announcements of these feelings.

Quite often, we have misinterpreted nonverbal mes-

sages. In the communications process, several nonverbal exchanges may occur before anyone attempts a verbal exchange. These impressions or feelings may be valid, or they may be totally invalid. Without testing the accuracy of our nonverbal impressions, we may create false assumptions that we will soon regard as truths. We can create huge barriers, misconceptions, and false assumptions without using any words.

Imagine this nonverbal scenario at the start of Jim's early morning training session. Jim worked late last night, overslept ten minutes this morning, and arrived only seconds ago to face a complete wreck of a training room. Muttering to himself about the perversity of fate and what he would like to do to the persons responsible, he attempts to conquer his anger and begins to set up equipment while contemplating the mysterious disappearance of the overhead projector and the much-needed coffeepot. Manuel and Mary, two extremely early arrivals, appear at the door and stand waiting for some acknowledgement of their presence. There is none, for Jim neither sees nor hears them. They look at each other, raise their eyebrows, and smile. Jim turns and sees this amused look. Think of all the possible nonverbal thoughts and remember that no one has said a word. To carry this scene a bit further, imagine all the possible thoughts that could continue to flood both their conscious and unconscious minds.

Trainers must learn to observe and interpret both their and the participants' nonverbal behavior. They must be aware of the nonverbal signals they receive and the nonverbal signals they send. Good trainers will never assume a meaning for their participants' nonverbal signals; they will always verbally test the accuracy of their observations.

Multitudes of nonverbal communication signals constantly flood our senses. The most common nonverbal communications signals come from our personal appearance,



our posture, our facial expressions, our gestures, and—believe it or not—our silence. Our personal appearance says much about us. Often times, we judge people by their appearance; and often times, we misjudge people by their appearance. It is wiser, however, for trainers to appear neat, conservative, and clean than for them to appear disheveled, flamboyant, or dirty. It is also wise not to judge participants by their appearance.

Wisdom is also required in interpreting posture, facial expressions, and gestures. One gesture or one facial expression may not be indicative of anything; several signals may have great meaning. Bookstores contain many excellent guides to nonverbal communication, and the books by Julius Fast, Gerald Nierenberg, and Henry Calero are both informative and easy-to-read.

The trainer's most valuable skill will be the ability to communicate clearly and positively with all participants, and all good trainers will realize that communication must actively involve all participants. All participants should feel free to offer comments and ask questions at any point in the training program. Good communication is shared responsibility between the trainer and the participants, but the trainer must encourage the participants to communicate.

Good trainers will always emphasize the positive. They also will avoid any references which reflect their value systems if these value systems are not commonly shared by the entire group. Good communication skills will create a warm, supportive climate for learning and present information and skills in a clear, concise, easily understood fashion. Good communication skills will create a clear understanding of the training program's objectives and help everyone learn.

**C·H·A·P·T·E·R N·I·N·E**

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**Evaluating**

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**Training**

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**Program**

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*“A little learning is not a dangerous thing to one who does not mistake it for a great deal.”*  
—William Allen White

**E**valuation is an essential element in training program design. It is also the most neglected. Trainers often exhaust themselves conducting needs assessments and developing training programs to meet their organization's needs without giving thought to the importance of evaluation. Little thought and less effort generally characterize most methods of evaluation. The most common method is something generally termed a “happiness report.” Happiness reports require little effort to develop. They consist of two or three or more open-ended questions such as “Will this training program help you to perform your work more capably?” The aim of the questions is to receive feedback, and positive feedback is obviously the preferred type. Happiness reports are very nice, and they give the trainer a sense of accomplishment. After working diligently to develop and conduct a training program, most trainers deserve a pat on the back.

Participants are generally receptive to this type of evaluation. The rules specifying positive comments are unspoken, but well understood by those who both design and respond to this type of evaluation. After all, who would be so rude as to tell a parent (the trainer) that his baby (the training program) is less than beautiful and very nearly perfect—absolute perfection being humanly impossible. Participants are usually too polite to be totally honest, and the comments are very similar to the “What a baby!” comments that greet the parents of newborns.

Effective evaluations, however, will measure the results of a training program. This means that the participants will

perform their duties and tasks in a measurable, observable fashion that is either better or worse than what they were doing before they attended the training program. An evaluation based on measurable, observable results will help the organization to achieve its goals and prepare training programs that are relevant, meaningful, and productive in terms of organizational growth and development.

## **What to Evaluate?**

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Evaluations that are measurable and observable will center on four points:

- Objectives of the training program,
- Behavior changes produced by the training program,
- Reactions to the training program, and
- Results in organizational terms of the training.

## **Evaluation of Objectives**

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Objectives are the key to both program design and evaluation. An evaluation of objectives should center on both the program's objectives and the participants' objectives. It is most meaningful to establish the relationship between these objectives and the learning experiences as the experiences are occurring. It reinforces the purpose of the training to have objectives repeatedly examined in terms of relevance and accomplishment.

## **Evaluation of Reactions**

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Reactions are very easy to evaluate. Anyone who is moderately perceptive can accurately gauge the participants' reactions. Most trainers are partially, if not completely,

actors at heart, and audience reaction is their ultimate goal. Most trainers also want to be loved by their program participants. Often they will go to any length to win this affection. Too often, they lose sight of their program's objectives in attempting to win the favor of the group and thus achieve their personal objectives.

An evaluation of reactions is at best a modification of the happiness report. Of course, a training session should always create a pleasant, supportive environment for learning. An evaluation of participants' reactions will evaluate climate, but it will not establish whether any learning has actually occurred.

## **Evaluation of Behavior**

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An evaluation of behavior changes is the most desirable form of evaluation. The problem comes in deciding how you will evaluate changes in behavior. This is most crucial. You must analyze what performance you want to change, and decide how you will be aware that the performance has indeed changed.

First, you will need some measure of current abilities or performance. Then you will need to establish improvement goals. You must anticipate success and inform your participants of the level of current performance versus expected performance. If your problem is volunteers who are not punctual, this is an easy performance to measure. If your problem involves care and return of equipment, this is an easy performance to measure. For both types of performance problems, you merely count the number of times per specified period that the problem occurs. In evaluating the effectiveness of the training program, you count the times the problem appears after training. The amount of change (for either the better or worse) will indicate the degree of success or failure. Of course, the

success or failure will be dependent upon not only the trainer but also the participant and the training program.

To establish an effective evaluation of behavior changes, you must first specify how you will measure these changes. Remember the changes must be *observable* and *measurable*. They must be actions you can *see* and *count*. This type of evaluation will be a most accurate assessment of the value of the training program.

## Evaluation of Results

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An evaluation of results will reveal how the behavior changes have benefited your organization. You may be able to measure changes in behavior without understanding how these changes impact the effectiveness of your organization. Remember the ultimate goal of training is the growth and development of your organization. A measurement of results will reveal how this training program has affected the organization.

Evaluating the effects of training on organizational growth and development will also involve some discussion of how you will analyze the impact of training. How will you be able to see and count the organizational changes resulting from the training? This is the ultimate test of a training program's effectiveness.

You may make statistical comparisons. The problems inherent in statistics are many. Foremost, is the ability to use statistics to prove whatever you want to prove. Remember Benjamin Disraeli's statement, "There are three kinds of lies: lies, damned lies, and statistics." Statistics are often difficult for others to understand. Mrs. Robert A. Taft illustrated this difficulty most succinctly: "I always find that statistics are hard to swallow and impossible to digest. The only one I can ever remember is that if all people who go to sleep in church were laid end to end, they would be a lot more comfortable."

Any use of statistics to evaluate the effectiveness of training should be approached with caution and expertise.

You may also measure results by both observation and before and after comparisons. Organizational climate, for instance, is difficult to measure in objective terms, but it is most obvious to any observer. Merely walking in the front door of most organizations will give you an immediate feel for the climate within the organization. If one of your objectives was a change in organizational climate, it might be effectively evaluated by mere observation. Before and after comparisons of data would, however, lend validity to these observations. Observations are, of course, totally subjective, and objective data will greatly enhance their value.

## **Who Evaluates the Training Program**

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Who should evaluate the training program is always a cause of concern. The answer to who evaluates the training program is simple: Everybody! Evaluations should involve the following:

- The supervisor of the organization's training, education, and development programs,
- The trainer,
- The participants, and
- The organization.

The person who supervises all the organization's trainers and who is ultimately responsible for organizational training, education, and development programs together with the trainer and program developer should certainly evaluate whether the program met the training objectives as well as the organizational goals. The trainer must evaluate constantly during the program both the value and effectiveness of the program. Every moment when the

trainer is not actively involved in the program, he or she should evaluate what has gone before, what is happening now, and what will happen later.

These conscious, but silent, evaluations should center on the program objectives, and changes to the program should be made as these seem necessary to accomplish the program's objectives. Of course, the trainer must also evaluate the program in its entirety.

The *participants* should evaluate each section of the program each day of the program and also the completed program. Evaluation (formal or informal) of each section ensures that future learning builds on a firm foundation. Evaluation of each day will help plan for the next day, and evaluation of the program will help plan for the next program.

The *organization* should evaluate its training programs on a yearly basis at least. This yearly evaluation should be a part of the organization's planning process, and plans should certainly include training plans. Training is a necessary component of organizational planning.

To be most meaningful, evaluations should occur

- Before (in planning how to evaluate and in establishing current performance levels),
- During (to ensure that objectives are being met), and
- After (to plan for future training programs).

## ■ Evaluation Forms

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Usually, trainers use either an objective or a subjective evaluation form. The objective form allows participants to rank elements of the program on a five-part (or three-part) Likert scale. The subjective form allows participants to express opinions using their own terms and words. All evaluation forms should be anonymous; otherwise, they



have no use—not even as “happiness reports.” Having participants sign evaluation forms encourages lying.

## **Objective Evaluation Forms**

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Objective evaluation forms really tell you nothing, but they do provide you with some nice numbers to use in writing reports about the effectiveness of the training. You can readily state that seventy-five percent of the participants found the material presented to be most effective. As true measures of a program's effectiveness, their value is debatable.

The Likert scale establishes a certain number of ranks (three and five are favorites) from a high value to a low value and uses terms such as Excellent, Good, O.K., Fair, Poor, and terms such as Totally effective, Very effective, Somewhat effective, Totally ineffective. You begin to get the idea?

## **Sample Topics Found in Objective Evaluation Forms**

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Topics which may be rated according to a Likert scale often include the following:

- Overall effectiveness of the training program,
- Realistic objectives,
- Organization of content,
- Application to the participants' needs,
- Level of material difficulty,
- Selection of learning methods,
- Selection of learning aids,
- Selection of training site and facilities,
- Accomplishment of objectives,
- Length of program, and
- Effectiveness of trainer.

## **Subjective Evaluation Forms**

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Subjective evaluation forms give you definite statements of the participants' views of the program's effectiveness. They involve open-ended questions, and they should be a part of the training program. An effective evaluation, however, will involve more than subjective evaluations by participants. Subjective evaluations should not include more than four or five questions because participants are usually not interested in writing volumes of information. If you can remember how you once felt when the school bell finally rang at the end of the day, you will feel some empathy for their eagerness to leave.

## **Sample Questions Found in Subjective Evaluation Forms**

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The following questions are representative of the type questions found on subjective evaluation forms:

- Did this program achieve its objectives? Why or why not?
- Did you achieve your personal learning objectives? Why or why not?
- What parts of the program were most helpful? Least helpful?
- What would you change about this program?
- What would you add to this program?
- Will you be able to apply what you have learned to your job?
- What comments do you have about the trainer, course organization, learning methods, and learning materials?

## **What Do You Do With Evaluations?**

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Most often evaluation forms are put in files never again to

see the light of day. Effective evaluations, however, should result in the following:

- Changes in training design,
- Development of follow-up training,
- Repetition of training programs, and
- Changes in performance.

If an evaluation does not reveal an improvement in job performance or achievement of organizational goals, the training program should definitely be closely examined. New needs assessments should always follow the evaluation, and training programs should be constantly evaluated, revised, scrapped, or repeated.

Remember, results are the bottom line. Changes in both behavior and training programs should be measurable and observable. All changes should aid the growth and development of the organization.

## **Importance of Evaluations**

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Evaluations are an integral element in the needs assessment, training, evaluation cycle. Evaluations are an integral element in the ongoing, cyclical life of an organization, and effective evaluations definitely should influence the planning process in each successive cycle.

## **Evaluating the Training Program Exercises**

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1. Determine how you will evaluate the following:
  - a. Did the training program meet its objectives?
  - b. What were the reactions of the participants?
  - c. What behavior changes has the training produced?
  - d. How will these behavior changes benefit the organization?

**2. Who will evaluate the training program?**

- a. The trainer**
- b. The participants**
- c. The organization**

**When will they evaluate the training program?**

**What evaluation procedures will they use?**

**3. Develop a “happiness report” for the training program.**

**You surely deserve one!**