TRAINING OF TRAINERS

Produced by:
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ToT TRAINER'S GUIDE

Table of Contents

PAGE

HOW TO USE THE ToT TRAINER's GUIDE

1. **Tools and materials for preparation**

   - Master Agenda - The agenda links the participant's manual text pages and the handouts to the sessions for which they are intended. It can also be used as a record of the division of responsibilities between NTP trainers.

   - Handouts - There are handouts with virtually every session. Each is numbered and keyed to a master agenda. A compilation of all the handouts is available from the NTP project director. The ToT Handout Directory is included in this Guide.

   - Participant Materials - Participants will receive the following (in addition to the handouts):

     - ToT Manual - a/k/a participant's manual - this is the text for the program

     - Training Resources - this is a separate booklet containing articles on the topics covered in the ToT program. It tracks (in a general way) the ToT manual. It is designed as a take-home resource but trainers should use it at least once during the session to familiarize participants with it.

     - Library-By-Mail -This is a separate book that features all material available on a two-week loan basis from our training library. It consists of books, videos, games and periodicals.

2. **How to integrate the materials**

   - Use the master agenda to coordinate your review of the ToT manual, handouts and this Trainer's Guide.

   - Study the objectives for each session and determine what modifications are needed for a particular ToT event.

   - Review the *state-specific agenda* - make appropriate modification in your training plan

   - Call the NTP Project Director for information on the SUA plans for an offshoot training and copies of the participant's applications if you have not received them.

   - Review the participant applications. Modify plans to meet the needs of your audience.

****Special Note**** *The appropriate number of each handout is described in the Handout Directory.*

ToT TRAINERS' MASTER AGENDA GUIDE - 2 DAYS

Rev. 8/99

SESSION	TOPIC	TIMES	TEXT	H/O	TR
DAY ONE	Registration	8:30 AM - 8:45 AM		1-4	
	Overview of Training				
SESSION 1:	Overview of Training	8:45 AM - 9:15 AM	None	6-10	
SESSION 2:	Qualities and Style of an Effective Trainer • Trainer Styles • Trainer Roles - (Presenter/Facilitator) • Principles of Training - Adult Learning Theory - Characteristics of an Effective Trainer - 10 Commandments	9:15 AM - 10:30 AM 20 min (mini exercise) 20 min (lecture) 35 min (lecture/discussion)		5	
	BREAK	***10:30 AM - 10:45 AM***			
SESSION 3:	Training Techniques • Overview of Training Techniques • Post-Training Retention • Tips of Effective Lecturing	10:45 AM - 11:45 AM 25 min (lect/discus) 10 min (lect/discus) 25 min (lect/discus)		NA	
SESSION 4:	Conducting Small Group Exercises • Leading Small Groups • Gardening Exercise • Participant discussion	11:45 AM - 12:30 PM 15 min (lecture) 20 min (exercise) 10 min (debrief)		11	
	LUNCH	***12:30 PM - 1:45 PM***			
SESSION 5:	Group Dynamics and Development • Stages of Development; • Roles of group members; • Participant small group exercise (Room 22-B)	1:45 PM - 3:00 PM 20 min (lecture) 20 min (exercise) 20 min (debrief)		15	
	BREAK	***3:00 PM - 3:15 PM***			
SESSION 6:	Trainer Interventions as a Communication Strategy • Active Listening • Participant practice -- "Handling Difficult Situations" • Relationship to Group Dynamics	3:15 - 4:30 PM 25 min (lecture) 30 min (small group role plays or participant-led discussion) 20 min (debrief)		16	

SESSION	TOPIC	TIMES	TEXT	H/O	TR
DAY TWO	**Training Techniques – Practice** Rev. 8/99				
SESSION 7:	Individual Presentations Presenter/Partner Preparation Presentations Review of videos immediately after each presenter, if enough time	9:00 AM - 12:00 PM 15 min (preparation) 5 min presentation + 10 min debrief = 15 min per presenter		13 14 20 (optional)	
	LUNCH	***12:00 PM - 1:30 PM***			
	Training Design and Conference Coordination				
SESSION 8:	Conference Coordination Low-Cost Training Tips; Meeting Room Set-up/Problems; Meals/Breaks; Special Considerations	1:30 PM - 2:15 PM		NA	
	BREAK	***2:15 PM - 2:30 PM***			
SESSION 9:	Training Design Selecting Training Methods; Design of local training events – individual small group, & round robin discussion of current/planned training activities; Purposes and Uses of Evaluations	2:30 PM - 3:45 PM		17	
SESSION 10:	NTP Training Materials and Technical Assistance NTP Substantive Training Modules & integration with trainer notes; NTP Evaluation Tools (pre/post test); Technical Assistance	3:45 PM - 4:30 PM		12 18 19	
SESSION 12:	Wrap-up, Evaluation, and Closing	4:30 PM - 5:00 PM		21 22 23 29	

ToT TRAINERS' MASTER AGENDA GUIDE - 2 DAYS (#2)

Rev. 8/99

SESSION	TOPIC	TIMES	TEXT	H/O	TR
DAY ONE	Registration	8:30 AM - 8:45 AM		1-4	
	Introduction to Training Techniques				
SESSION 1:	Introduction, Orientation, & Overview of Training	8:45 AM - 9:15 AM	None	6-10	
SESSION 2:	Qualities and Style of an Effective Trainer • Trainer Styles • Trainer Roles - (Presenter/Facilitator) • Principles of Training - Adult Learning Theory - Characteristics of an Effective Trainer - 10 Commandments	9:15 AM - 10:30 AM 20 min (mini exercise) 20 min (lecture) 35 min (lecture/ discussion)		5	
BREAK		***10:30 AM - 10:45 AM***			
	Training Techniques -- Practice				
SESSION 3:	Individual Presentations Presenter/Partner Preparation Presentations Review of videos immediately after each presenter, if enough time	10:45 AM - 12:30 PM 15 min (preparation) 5 min presentation + 10 min debrief = 15 min per presenter		13 14 20 (optional)	
LUNCH		***12:30 PM - 1:30 PM***			
SESSION 4:	Training Techniques • Overview of Training Techniques • Post-Training Retention • Tips of Effective Lecturing	1:30 AM - 2:30 AM 15 min (lect/discus) 10 min (lect/discus) 20 min (lect/discus)		NA	
BREAK		***2:30 PM - 2:45 PM***			
SESSION 5:	Conducting Small Group Exercises • Leading Small Groups • Participant exercise and discussion	2:45 AM - 4:00 PM 20 min (lecture) 20 min (exercise) 15 min (debrief)		11	
CLOSING DAY ONE:	Debrief the day - review goals review activities of day two.	4:00 PM - 4:30 PM		NA	
OPTIONAL	Evening Video Review • Participants sign up for 10 min. slots	5:00 PM - 6:30 PM		NA	

SESSION	TOPIC	TIMES	TEXT	H/O	TR
DAY TWO					
SESSION 1:	Group Dynamics and Development • Roles of group members; • Stages of Development; • Participant small group exercise	9:00 AM - 10:30 PM 20 min (lecture) 20 min (exercise) 20 min (debrief)		15	
	BREAK	***10:30 PM - 10:45 PM***			
SESSION 2:	Trainer Intervention/Feedback Techniques • Active Listening - "I-messages"; • Leading Discussions/Fielding Questions; • Participant practice -- "Handling Difficult Situations"	10:45 AM - 12:00 PM 25 min (lecture) 30 min (small group role plays or participant-led discussion) 20 min (debrief)		16 16a	
	LUNCH	***12:00 PM - 1:30 PM***			
	Training Design and Conference Coordination				
SESSION 3:	Conference Coordination • Low-Cost Training Tips; • Meeting Room Set-up/Problems; • Meals/Breaks; • Special Considerations	1:30 PM - 2:00 PM		NA	
SESSION 4:	Training Design • Selecting Training Methods; • Design of local training events -- individual small group, & round robin discussion of current/planned training activities; • Purposes and Uses of Evaluations	2:00 PM - 3:00 PM		17	
	BREAK	***3:00 PM - 3:15 PM***			
SESSION 5:	NTP Training Materials and Technical Assistance • NTP Substantive Training Modules & integration with trainer notes; • NTP Evaluation Tools (pre/post test); • Technical Assistance	3:15 PM - 4:00 PM		12 18 19	
SESSION 6:	Wrap-up, Evaluation, and Closing	4:00 PM - 5:00 PM		21 22 23 24	

Tot TRAINERS' MASTER AGENDA GUIDE - 3 DAYS

Rev. 8/99

SESSION	TOPIC	TIMES	TEXT	H/O	TR
DAY ONE	Registration	12:45 - 1:00 PM		1 2 3 4	
	Introduction to Training				
SESSION 1:	Introduction, Orientation, & Overview of Training	1:00 - 1:15 PM	None	6-10	
SESSION 2:	Qualities and Style of an Effective Trainer Trainer Roles - (Presenter/Facilitator) Principles of Training - Adult Learning Theory - Characteristics of an Effective Trainer - 10 Commandments Tips of Effective Lecturing	1:15 - 2:15 PM 20 min 30 min 10 min		5	
	BREAK	***2:15 - 2:30 PM***			
SESSION 3:	Individual Presentations	2:30 - 5:00		13 14 20 (optional)	
OPTIONAL	Individual Video Review	Evening (Optional)			
DAY TWO	**Training Techniques -- Theory and Practice**				
SESSION 4:	Training Techniques Lecture Review & Pointers Overview of Other Training Techniques	9:00 - 9:45 AM		NA	
SESSION 5:	Leading Small Groups & Conducting Small Group Exercises Participant exercise and discussion	9:45 - 10:30 AM		11	
	BREAK	***10:30 - 10:45 AM***			
SESSION 6:	Group Dynamics and Development Roles of group members; Stages of Development Participant exercise	10:45 - 11:45 AM 20 min (lecture) 20 min (exercise) 20 min (debrief)		16	
	LUNCH	***11:45 AM - 1:00 PM***			

SESSION	TOPIC	TIMES	TEXT	H/O	TR
SESSION 7:	Trainer Intervention/Feedback Techniques Active Listening - "I-messages"; Leading Discussions/Fielding Questions; Handling Difficult Situations	1:00 - 2:45 PM 35 min (lecture) 40 min (participant led discussion 30 min (debrief)		16 16a	
BREAK		***2:45 PM - 3:00 PM***			
Training Design and Conference Coordination					
SESSION 8:	Presentation Style & Critiquing Techniques Participants practice different training methods and critiquing skills	3:00 - 5:00 PM		NA	
OPTIONAL	Individual Video Review	Evening (Optional)			
DAY THREE	**Training Design and Conference Coordination**				
SESSION 9:	NTP Training Materials and Technical Assistance NTP Substantive Training Modules & integration with NTP Hypothetical Cases with trainer notes; NTP Evaluation Tools (pre/post test); Technical Assistance	9:00 - 10:00 AM		12 18 19	
SESSION 10:	Conference Coordination Low-Cost Training Tips Meeting Room Set-up/Problems; Meals/Breaks; Special Considerations	10:00 - 10:45 AM		NA	
BREAK		***10:45 AM - 11:00 AM***			
SESSION 11:	Training Design Design of local training events & round robin discussion of current/planned training activities	11:00 AM - 12:30 PM		17	
SESSION 12:	Evaluation and Closing	12:30 - 1:00 PM	N/A	21 22 23 24	

ToT Handout Directory

____ #1 **ToT PARTICIPANT INFORMATION SHEET** (Demographic Sheet)
Opening Session – One for each participant to be filled out at the beginning of the training and returned to the trainers on Day 1. (# of participants + 2) *Place in two pocket folder, right side.*

____ #2 **NTP BLURB/FACT SHEET**
Opening Session – One for each participant during Orientation and Overview. (# of participants + 2)
Place in two pocket folder, right side.

____ #3 **ELDER LAW FORUM**
Opening Session – One for each participant during Orientation and Overview. (# of participants + 2)
Place in two pocket folder, right side.

____ #4 **AARP PUBLICATIONS LIST**
Opening Session – One for each participant during Orientation and Overview. (# of participants + 2)
Place in two pocket folder, right side.

____ #5 **STYLE INVENTORY SCORING SHEET** Session 2 – One for each participant. (# of participants +2)
Place in two pocket folder, right side.

____ #6 **AGENDA**
Place in two pocket folder, right side on top.

____ #7 **NTP TECHNICAL ASSISTANCE BROCHURE and ORDER FORM**
Place in two pocket folder, right side.

____ #8 **PARTICIPANT LIST**
Place in two pocket folder, left side.

____ #9 **TRAINER BIOS**
Place in two pocket folder, left side.

____ #10 **LIGHTER SIDE OF *trainingworks* -**
Place in two pocket folder, left side.

____ #11 **GROUP EXERCISE ASSIGNMENTS**
Session 5 – Give a different instruction page to each of the three groups. Give no oral instructions other than where each group should be located (1 set of 3 sheets).

____ #12 **LIBRARY-BY-MAIL BOOKLET**
Technical assistance lending library available to post ToT participants. Participants can borrow books, videos, games, and periodicals from the NTP lending library on a two week loan basis.
(Place in two pocket folder, left side in the back)

____ #13 **PARTNER CRITIQUE FORMS**
As close-out to lecture portion of Session 3 – Give to each participant prior to presentations to discuss their individual issues with a partner. Partners record observations on this form and return to presenter after the presenter's presentation. (# of participants +2)

____ #14 **PARTICIPANT CRITIQUE FORMS**
As close-out to lecture portion of Session 3 – Each participant receives enough copies to have one for each of the presentations s/he witnesses. All presenters should be offered the written comments from their co-participants immediately after their presentations. (# of participants X number of participants +10)

____ #15 **ROOM 22-B EXERCISE** (Group Dynamics)
Session 6 - **Only** give one to each person serving as an ***observer*** for exercise. (Roughly 1-3 participants, depending on size of total group and number of small groups you decide to have) (5 handouts)

____ #16 **ANSWERS TO DIFFICULT SITUATION EXERCISES & INSTRUCTIONS**
Session 7 – **Participant-led exercise** – Give one each of the participants who will lead the group discussion. (3 sets) Allow adequate time for leaders to prepare. **Small group role plays or NTP trainer-led discussion** – Hand out to all participants during role play debrief. (# of participants +2)

____ 16a (optional) **INSTRUCTIONS FOR LEADING THE DIFFICULT SITUATIONS EXERCISE**
Session 7 – **Participant-led exercise** – Give one each of the participants who will lead the group discussion. Allow adequate time for leaders to prepare.

____ #17 **TRAINING DESIGN GUIDELINES & WORKSHEET**
Immediately before Session 11 – Distribute one to each participant after reviewing "Choosing Training Methods" in "Training Techniques" section of module. (# of participants +2)

____ #18 **NTP TRAINING MODULES AND CASES**
Select training module based on area major of the group. Will focus on their substantive expertise.

____ #20 **ENCORE PRESENTATION PARTNER CRITIQUE FORM**
Use for second presentation. (# of participants +2)

____ #21 **NEXT STEPS PLAN**
Place in two pocket folder, left side on top.

____ #22 **ToT CERTIFICATES**
One individualized certificate for each participant should be signed by the NTP trainers. (Individualized certificates plus 2 blank signed certificates.)

____ #23 **ToT EVALUATION FORM**
Place in two pocket folder, left side on top. Collect and return to NTP.

____ #24 **FAST TRACK TRAINING SERIES**
Place in two pocket folder, left side on top.

SESSION: *INTRODUCTION AND OVERVIEW OF TRAINING* TIME: 30 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: None

HANDOUTS:
- ✓ ToT Participant Demographic Information Sheet (H/O #1)
- ✓ NTP Program Fact Sheet (H/O #2)
- ✓ NTP Technical Assistance Brochure (H/O #7)
- ✓ *Elder Law Forum* (H/O #3)
- ✓ AARP Publications Booklet (H/O #4)
- ✓ ToT trainer's biographies
- ✓ ToT Participant's Manual & Training Resources Guide
- ✓ Participant List (H/O #8)
- ✓ Agenda (H/O #6)

RESOURCE: None

OBJECTIVES:

1. To complete the demographic sheets

2. To provide an overview of Training of Trainers Program, including program goals and objectives, structure, and content.

3. To introduce participants to the non-training services of NTP.

4. To inform participants about the logistics of the training, including:
   - schedule
   - meeting facilities, location of restrooms
   - break and meal arrangements
   - other information that will help acclimate participants

5. To obtain a list of individual participant's ToT goals.

6. To give participants and trainers an opportunity to learn about the backgrounds and interests of the participants and to introduce trainers and conference support staff.

FLIPCHARTS:

AARP FOUNDATION'S
NATIONAL TRAINING PROJECT
601 E Street, NW
Washington, DC 20049
(202) 434-2197
Aalbright@AARP.org
www.aarp.org/ntltrpro/trproject.html

ToT TRAINERS:
(Name)
(Name)
(Local sponsor's name & organization)

(optional - modify to match the agenda)

OBJECTIVES OF ToT

To familiarize you with:

- Training principles
- Effective training techniques
- Impact of group dynamics and group diversity
- Handling real-life training situations
- Training design and materials development
- Basic elements of conference planning and coordination
- NTP's technical assistance and ongoing support

To provide you the opportunity to:

- Practice using training techniques
- Examine your own training style and your presentation
- Practice your presentation and receive feedback
- Begin planning/designing a future training and receive technical assistance

AGENDA

(Write up agenda items with start and end times for am/pm sessions. Note lunch plans)

BEFORE THE SESSION FORMALLY BEGINS:

1. Ensure participants sign an attendance sheet (name, organization, address).

2. Ask participants to complete and turn in demographic sheets.

3. Ask participants who have not tallied up the blue "Trainer Style Inventory" to do so.

KEY POINTS TO COVER:

1. Review the NTP Factsheet by highlighting the programs/services most likely to interest the group. Mention appropriate NTP publications (based on participants' backgrounds)

2. Give background on NTP's training project. Briefly mention NTP's post-ToT support.

3. Walk through and explain how to use the Participant's ToT Manual --

   a. Session notes tell participants:

      - what will be covered and how;
      - when it will be covered;
      - why it will be covered (session objective) and
      - which resource manual section is relevant and illustrates this ToT program's design as a model.

   b. Text pages provide short written sections about the different topics covered in the training sessions.

4. Walk through the sections of Training Resources.

   a. Consists of journal articles, portions of training manuals, chapters of books, and other materials intended as background information for the topics we cover.

   b. Participants can use these pieces for future reference and for more detailed information on various training issues.

5. Discuss the general benefits of this ToT program:

   - Skills are transferable to other areas of life such as the courtroom, on-the-job supervision, or any interaction with people.

   - Encourage questions and comment since all have experience to share. The exchange should be among the entire group - not just trainer to group.

- Purpose of ToT is to enhance everyone's skills regardless of level they are at now.

  - establish the use of exercises as opportunities for participants to practice the skills they will be learning about.

  - emphasize multiple chances to try different training techniques and behaviors

  - outline that participants will be exposed to available NTP substantive and skills training materials and NTP training design, with an emphasis on practical application to participants' local training needs.

6. <u>Icebreaker</u> - Depending on the size and background of the group and the time available consider one of the following:

   - Name, organization and goal for this ToT (post on a flip chart),

   - Use the trainer style inventory discussion as part of the icebreaker,

   - Post humorous or outrageous quotes/statements about training/learning on the walls. Ask people to read them and then stand by the one that interests them or with which they agree/disagree. Ask people to then discuss the quotes with others in their group. An alternative is to use icebreaker samples and to follow with a discussion on icebreakers, or

   - Ask participants to relate their "worst training moment."

*****Special Note******

* Since timing is crucial during this first session, trainers may opt to simply have participants introduce themselves and note their ToT goals.

* During the training, Trainers should keep notes on the types of training each person does, and plans to do on the "Participant Attendance & Training Plans Worksheet."

SESSION: ***ROLES & CHARACTERISTICS OF AN EFFECTIVE TRAINER*** TIME: 30-45 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: "The Roles of a Trainer"
"Characteristics of an Effective Trainer"

HANDOUTS: Style Inventory Scoring Sheet (H/O #5)
(Trainer Style Inventory Sheet was sent to participants with their acceptance packet)

RESOURCE: Co-Training; Facilitating Productive Meetings; Duties of Discussion Leaders

OBJECTIVES:

To enable participants to:

1. Identify their own primary trainer styles and understand the impact of trainer style on the effectiveness of the training.

2. Identify the two (2) basic roles of a trainer -- presenter/expert and facilitator.

3. Discuss the different characteristics and skills trainers need to have to ensure quality training that meets audience's needs.

KEY POINTS TO COVER:

1. Trainer Role & Style (transition) (15 minutes)

   a. Have each participant tally their blue "Trainer Style Inventory". The summary scoring sheets are in the participant packets. The description of the trainer styles is in the "Trainer Roles" text material.

   b. Post individual results on a flipchart -- ask participants to note their highest score and note the participant's initials and the score in the appropriate quadrant of the flipchart. Lead a discussion on the value of a balance of style preferences.

   c. Have participants validate for themselves (read descriptions for own). Break into like styles. Identify task. Each group look at: Strengths, Blindspots, learning assumptions and what style might compliment and why.

   d. Each group picks spokesperson for the debrief.

FLIPCHART:

TRAINER STYLE

Organized Neat Structured Logical Timely	Inclusive Trusting Warm Supportive Casual Intuitive
Directive A	B Supportive
Reflective D	C Active
Active Listener Creative Imaginative Flexible Tactful Reflective	Energetic Charismatic Social Active Risk-Taker

2. Trainer Characteristics and Skills

   a. Depending on time, either solicit ideas from group or walk through using text materials and/or flipchart.

   b. Use this discussion to lead to the 2 roles of the trainer -- Presenter/Expert and Facilitator/Seeker.

FLIPCHART:

CHARACTERISTICS AND SKILLS OF AN EFFECTIVE TRAINER

- Active Listening
- Peripheral Vision
- Empathy and Sensitivity
- Sense of Timing
- Clarity
- Flexibility
- Availability
- Enthusiasm about Learning
- Appropriate Sense of Humor
- Natural Verbal and Non-Verbal Language
- Positive and Realistic
- Self-Disclosure
- Role Model

3. Different Roles of a Trainer -- Ask Group for ideas on the following

   a. What a **Presenter** Does (list should include):

- provides new information, offers feedback, summarizes what was covered, etc.

- makes certain material is delivered in such a way that participants understand how it is relevant to their real world experience.

b. What a **Facilitator** Does (list should include):

- draws information and past experiences from participants

- gets others talking and participating

- involves the group in the learning process

- controls the flow of discussion

- creates and maintains a safe learning environment

c. Pose hypothetical training situations and ask which role is most appropriate.

FLIPCHART:

Presenter/Expert	**Facilitator/Seeker**
<Content>	<Process Issues>
•	•
•	•
•	•
•	•
•	•

SESSION: *PRINCIPLES OF TRAINING/ADULT LEARNING THEORY* TIME: 30 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: "Principles of Training"

HANDOUTS: None

RESOURCE: Basic Training for Trainers
Adult Learning Theory

OBJECTIVES:

To enable participants to:

1. Recognize the principles of adult learning and the implications for designing and delivering training to meet their audience's needs.

2. Recognize and discuss the impact of audience diversity on planning and delivering training.

3. Discuss common training problems and pitfalls.

KEY POINTS TO COVER:

1. Transition (2 minutes)

   a. Indicate that no matter what techniques a trainer uses, s/he has two basic roles - as presenter and as facilitator. Note that these roles are very different but each is important.

   b. In training adults, facilitation is often more appropriate and generally more effective.

   c. Note that most of us have been exposed to 12, 16, 19 or more years of a certain type of presentation of information - teaching. Training is distinguishable from teaching.

2. Distinction: Training vs. Teaching (5 minutes)

   a. *Teaching* -- providing information to learners that generally do not have familiarity with subject information; and requiring some sort of immediate indication of learning. Much of the information is processed for the learner.

   b. *Training* -- providing information to learners that has direct impact and relation to their experiences and knowledge. Learners are provided opportunities to integrate and process the newly acquired information and to apply it to their own needs.

FLIPCHARTS

TEACHING VS. TRAINING	
- Focus on Presenter	- Focus on Learner
- Information processed for learner	- Information processed, integrated and applied by learner
- Assumes learner has limited knowledge	- Assumes learner as a group have experience to offer
- Abstract information	- Concrete application
- Future oriented	- Apply now

PURPOSE OF TRAINING

To CHANGE:

- Knowledge
- Skills
- Attitudes, Opinions

(Note you will relate this to choice of training techniques later in the program.)

3. Adult Learning Theory (15 minutes)

   a. Introduce the concept. One possible way to involve the group is to ask how they learn best.

   b. Some of the characteristics of adult learners --

      - Want training to relate directly to their real-life business

      - Have some relevant knowledge, skill, or experience to build on and share with other participants

- Learn best by applying theory to practical solutions
- Are motivated by goals relevant to their specific needs
- Adults learn best in an informal atmosphere
- Adults learn best when exposed to a variety of training techniques
- Adult learning is impeded by:
  - being afraid of criticism
  - difficulties receiving feedback
  - negative memories of other learning experiences
  - competing priorities and outside pressures

FLIPCHART:

PRINCIPLES OF ADULT LEARNING

Relevant and Retainable
Appropriate to Audience
Informative
Needs and Priorities Oriented
Innovative
Noteworthy
General, yet Specific as needed

4. "The 10 Commandments" of Training (5 minutes)

   a. Follow the text pages and use the flipchart to highlight the more important points.

   b. Link the Role/Style information, as well as the Adult Learning Theory into the set of tips -- "The 10 Commandments".

FLIPCHART (Optional):

10 COMMANDMENTS OF TRAINING

Planning and Developing -

1. Don't try to cover too much.
2. Design with variety.
3. Don't assume about audience knowledge.
4. Consider how adults learn best.
5. Choose speakers carefully.
6. Incorporate materials and flipcharts with presentation.
7. Don't forget about logistics, the unsung hero of training.

Conducting -

8. Encourage participation.
9. Reinforce information - Repeat.
10. Encourage/Facilitate questions

5. Summary

a. Successful training depends on a number of factors --

- trainer's style and skill as a presenter.
- trainer's style and skill as a facilitator.
- trainer's ability to make the training relevant to participants' real world needs and to participants' level of knowledge and experience.
- expectations of the participants.

SESSION: *EFFECTIVE LECTURE AND OTHER TRAINING TECHNIQUES* TIME: 45 minutes

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: "Training Techniques Overview"
"Practice Tips"

HANDOUTS: None

SPECIAL MATERIALS
IN TEXT: Choosing Training Techniques
Training Techniques Plotting Chart
Overcoming Presenter's Anxiety and Butterflies

RESOURCE: Training Techniques

OBJECTIVES:

At the end of this Session, participants will be able to:

1. Identify the effect of different training methods upon post-training retention.

2. Link how adults learn and what they remember with variables in choosing training techniques.

3. Identify at least four (4) training techniques.

4. Identify which training methods will be most effective given a particular training objective.

KEY POINTS TO COVER:

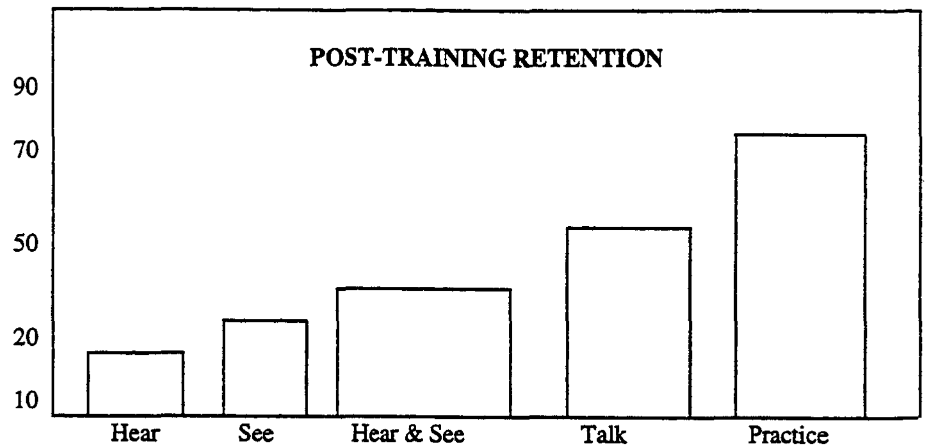
****Special Note****

* Generally you will not have time to adequately discuss all training techniques. It may be useful to spend the majority of the time on (1) post-training retention, (2) how to choose training techniques and (3) practical tips on lecture.

1. <u>Link Adult Learning Theory to Post-Training Retention and Choice of Training Techniques</u>

   a. Discuss the elements of adult learning theory and the average adult attention span (20 minutes)

FLIPCHART:



b. Review the 3 overarching objectives of training -- changes in knowledge, skills and/or attitude. Relate to different training techniques through use of the "Choosing Training Techniques" table in the text.

c. Selection of appropriate training techniques relates to adult learning, trainer role and style, training objectives, the material, the audience, and the trainer.

d. Emphasize the importance of using more than one training technique during a presentation

- helps keep energy level of group and trainer up higher, and
- provides different training methods to accommodate the different ways that people learn.

e. Emphasize that selecting a training method should be determined by:

- who your audience is - knowledge, skills, experience, age, attitude about attending the training, size of group
- what your training objective is for the learner - changing knowledge, skills or attitudes
- material being used
- time of day
- trainer's style, comfort and competence in the use of a given training technique
- need to alternate methods to boost retention

Overview of Training Techniques

a. Walk through the summary practice tips in the text:

FLIPCHART

USEFUL TRAINING TECHNIQUES
Lecture Question and Answer Small Group Activities/Exercises Visual Aids Group Discussion Role Plays Case Studies Panel Discussion Brainstorming Demonstration Team Teaching

b. Focus particularly on uses, advantages, and disadvantages of: (1) lecture, (2) questions, (3) visual aids, (4) group discussion, (5) small group activities, and (6) role plays. In the text, 2 types of visual aids are listed separately -- flipcharts and films/videotapes.

3) Lecture

a. Illustrate the uses of lecture and questions by pointing out how those 2 techniques have been used in this training so far.

b. Discuss the key elements of a lecture.

FLIPCHART

	LECTURE TIPS
Plan	
Analyze your -	audience
	topic
	setting
	training style
Prepare	
Develop your -	objectives
	organization
	structure
	production
Practice	
Check your -	timing and flow
	language and body movement
	visual aids
	equipment

c. Generate a list of practical tips for effective lectures (based on your experience and that of your audience.

d. Recommend that short lectures should be interspersed with question/answer -- an extremely effective method.

4. Questions/Answers

a. Emphasize 2 key points about questions -- (1) have a definite purpose for asking a question and (2) questions should already be formulated (roughly) before they are asked.

FLIPCHART:

PURPOSES OF QUESTIONS

- Emphasize a point
- Stimulate creative thinking
- Determine participants' experience and knowledge of topic
- Test group's understanding of material
- Encourage participants to begin applying new information
- Guide direction of discussion
- Draw participants into discussion
- Summarize material

b. Review the text material on types of questions; discuss when and how to use the different types.

- Use open-ended questions to: For example:

  - **create** non-threatening environment
  - **facilitate** application of training points to participants' own "real-life" situations
  - **draw** new participants into the discussion

c. Redirect questions from participants to other participants to encourage creative thinking and to foster group interaction.

5. Group Discussions

a. Trainers function as **Facilitators** and are responsible for the flow and direction of the discussion.

b. The discussion should create an environment for learning and applying relevant information to participants' own situations.

FLIPCHART (Optional):

DUTIES OF DISCUSSION LEADERS

- Include each member of the group
- Remain impartial, unless asked for your opinion
- Ask question, not make statements
- Encourage specific examples related to general ideas
- Direct the discussion, barring irrelevant points; re-direct, if necessary
- Facilitate the group members discussing points with each other
- Clarify points for better understanding
- Define terms to ensure common understanding, as necessary
- Make sure points are summarized

6. Visual Aids

FLIPCHART (Optional)

VISUAL AIDS - POINTS TO CONSIDER
1. Points audience should remember 2. Degree of technical complexity 3. Size of audience 4. Size of room 5. Later reference to information 6. Cost/Budget 7. Preparation time 8. Overall context of training 9. Time of day

7. Role Plays

   a. Ask the purposes and benefits of using role plays, e.g.—

      - present a controlled, partial replication of the real world
      - give participants a chance to practice new skills or applying new information in a safe environment
      - contrast with the elements that impede use of role plays ("anti-role play" hysteria)

   b. Steps of a role play(emphasize the importance of pre-training trainer preparation and walkthrough)

      - setting the scene
      - the role play
      - critiquing and discussing the role play
      - closure

   c. Discuss how to deflect "anti-role play" hysteria

      - use of trainer initiated informal, 1 minute role plays
      - adequate notice and preparation
      - sufficient preparation for role players
      - supportive, non-threatening atmosphere

8. Small Group Activities (will be covered in the next exercises)

Summary and Transition

a. All training techniques require a basic knowledge of group dynamics. The next exercise will demonstrate some of the issues involved in group development and dynamics.

b. Note that we chose to do small group work as this is one of the most commonly used techniques

SESSION: *CONDUCTING SMALL GROUP EXERCISES* TIME: 45 minutes

MATERIALS/RESOURCES/EQUIPMENT:

TEXT:	"Practice Tips" - Small Group Activities "Group Dynamics and Development"
HANDOUTS:	Group Exercise Assignments (H/O #11) (Trainer distributes one sheet to each group) (Optional) Packet with complete small group exercise and trainers notes
RESOURCE:	Trainer Interventions

OBJECTIVES:

To enable participants to recognize and understand the variables under a trainer's control in small group exercises.

KEY POINTS TO COVER:

Small Group Exercise Instructions & Exercise (25 minutes)

a. Divide participants into three (3) groups.

b. Distribute a set of written instructions to each group -- instructions vary in length and extent of detail provided. Do not allow groups to see another groups' instructions.

group #1 with the shortest instruction sheet - directed to an inconvenient place in the hotel, such as the lobby or in busy hallway. Do not announce the time limits. "The trainer will come and get you".

group #2 with the medium-detail instructions - directed to the break out room with no materials. They should have chairs set up.

group #3 with the most detailed instructions - remain in the main meeting room with a flipchart and other materials at their disposal

c. Allow groups 15 minutes to work on the problem.

d. After 10 minutes, indicate to Group #2 that a reporter must be chosen to give 3 minute summary.

e. Breaking into small groups - Try to set up groups to support the targeted work product for each group. Group #1 should be conducted to their work space first then Group #2. Group #3 remains in the training room.

f. During the exercise - One trainer works with Group #3). The second trainer monitors time and periodically checks on Group #2. Trainer 2 notifies Group #1 & #2 when it is time to return to the main training room.

2. <u>Discussion led by trainer</u> (15 minutes)

Group #1 reports - then ask people in group #1 how they feel about group process
Group #2 reports - then ask how they feel
Group #3 reports - then ask how they feel

Trainer - "Notice the different results - why? - We often ask people to do a task and are then unhappy about the results.
90% of the time we get back what we ask to happen.
The trainer is responsible for the results. The group cannot fail -- it is only the trainer's failure to prepare."

Trainer ask a representative from each group to read their instructions

Group #1 first
Group #2
Group #3

<u>Debrief</u>

a. Note that each group produced different results and each result could be the appropriate one depending on whether the goal is a written agenda or a brainstorming session about the larger issue

b. Ask participants –

- how they felt as they began to work on the problem
- if they felt any changes occur in the way the group functioned as they spent more time on the problem
- how trainers effect group behavior
- how each group functioned with its set of instructions
- what problems arose at content or process levels
- how they felt about the exercise
- what would have helped each to function more effectively as a group

****Special Note****

* The purpose of this exercise is twofold: (1) it demonstrates the enormous effect a trainer and instructions have on the functioning of a group, and (2) it shows how logistics effect training.

- You may want to note examples of difficulties encountered by the two "out" groups which were caused by having inappropriate facilities for the work they were trying to do. These examples fit nicely in the discussions in "Conference Coordination and Planning" by emphasizing that conference coordination is an integral part of training design and delivery, not just a long list of menial chores.

FLIPCHARTS

Trainer prompts are noted in italics

Trainer involvement - *clarify your role in the exercise*
presenter?
timekeeper?
recorder?

Goal for exercise - process (*brainstorm*)
product - *spellout what wanted (list, quality, & quantity)*

Task Group - *produce a product/solve a case study*
Discussion - *group topic/free flowing*
Problem Solving Group - *What can we do?*

Time - *For each element of the exercise (preparation/the exercise itself/the large group discussion)*
If participant told how much time they have to do the exercise, they will do it differently

Selecting Groups
- random? (appear random)?
- by job function?
- by background?
- tell them the criteria and allow to self select

1st time - put together not known stress why breaks patterns reduces competion leveler

Trainer prompts are noted in italics

Instructions
- post on flip chart?
- handout?
- orally-do 2x for understanding
- open ended vs. specific
- brainstorm vs. list
- what expect after? post the product and tell the group:
list of ideas
ranking of ideas
solve problem and make a recommendation

Materials needed

How to Break the news - *give rationale - "why important to you?" not just mechanics of what to do*

Debrief - *have prepared list of points and questions*

Group size
- *3 minimum size*
- *4 effective*
- *5-6 optima;*
- *7-8 effective*
- *8-9 sub groups will form*

Technical and the more thought
Ideas/Creativity and group 6-7

SESSION: *GROUP DYNAMICS AND DEVELOPMENT* TIME: 60-70 minutes

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: "Practice Tips" -- Small Group Activities, Discussion Groups, Role Plays
"Group Dynamics and Development"

HANDOUTS: Room 22-B Exercise - (H/O #15)

RESOURCE: Trainer Interventions
Group Dynamics

OBJECTIVES:

To enable participants to:

1. Identify three (3) basic stages of group development.
2. Discuss two (2) characteristics of each stage of group development.
3. Describe one (1) trainer function at each stage of group development.
4. Identify two (2) disruptive behaviors which interfere with group activity.
5. Demonstrate an understanding of the use of group discussion as a training technique.

KEY POINTS TO COVER:

1. Transition (5 minutes)

   a. Last session demonstrated how the trainer can effect how well a group accomplishes its goals.

   b. This session focuses on how groups function generally, and how they function at the various stages of development.

2. Group Dynamics lecturette (15 minutes)

   Walk through Group Dynamics text -- group roles and development stages--prior to conducting exercise.

   Stages of Group Development

   a. Walk through the text material on the 3 basic stages of group development. Ask trainees for input.

FLIPCHART

STAGES OF GROUP DEVELOPMENT
Stage 1 ***Organization*** - group is forming and testing the waters
Group Behavior:
Trainer Role:
Stage 2: ***Evolution*** - group establishes roles and standards for working together
Group Behavior:
Trainer Role:
Stage 3: ***Production*** - group actually does the work it was designed to do
Group Behavior:
Trainer Role:

Ask participants for personal examples demonstrating how group members behave at each stage, such as:

- ***organization*:** ask a lot of questions; lack focus on the task and goals; demonstrate anxiety about their participation; not a lot of interaction between and among members; high interaction with trainer;
- ***evolution*:** more focus on the task and goals; more interaction among members; more active listening and helpful feedback between members; less competition between members; begin to be independent from the trainer.
- ***production*:** high level of participant interaction; more focus on the job than roles; more collaboration and sharing of information and helpful feedback; mutual support for experimenting and taking risks;

b. Describe the trainer role at each stage. Discuss the importance of the trainer adapting to the change in the group.

- ***organization*:** trainer is highly directive; acts as a presenter and defines the group activity
- ***evolution*:** trainer role is changing - becoming less directive; role vacillates between presenter and facilitator.
- ***production*:** trainer's role tends to be as a facilitator; most of the time is spent on monitoring group process and providing for group comfort, etc.

3. Discuss Individual Roles (10 minutes)

Review the text materials on the various individual roles in a group. Emphasize the cultural values attached to different roles. Stress that all roles (except the purposely disruptive) can be useful to move the group forward. Both leaders and process-conscious members are needed.

FLIPCHART (ask group to list the roles):

Individual Roles
Content:
Process:
Disruptive:

4. Small Group Exercise (20 minutes)

- The exercise is designed to help participants learn how groups behave.
- The exercise involve breaking the large group into 2 small groups plus observers. The observers are participants who work with the NTP trainers in the debrief after the exercise.

Total Time: **45 minutes**

ToT Trainers Instructions
GROUP DYNAMICS: ROOM 22-B EXERCISE

instructions	-- 5 minutes
exercise	-- 15 minutes
debrief	-- 15 minutes (entire group)

Objective: To provide participants the opportunity to experience, observe and discuss various kinds of group roles and their impact.

This exercise should immediately follow after a 15-20 minute lecture on Stages & Development and Roles of Group Members. (*See Training Module text*)

Trainer Preparation

The trainer should prepare the following for each group of Decoders:

- Flipchart page with the numeric portion of the code
- 31/4 flip chart page to tally the purchases

The numeric code page can be written directly on the flipchart sheet. The recorder adds the alphabetical portion of the code as the numbers are purchased. As an alternative, the trainer can prepare a flipchart page with the alphabetical code on the chart. Each letter can be covered by a 5x5 index card with the numeric code. The cards are removed as the purchases are made.

Instructions to Entire Group

Explain that the purpose of the exercise is to break an alpha-numeric code. Show the code as below:

1	**2**	**3**	**4**	**5**
6	**7**	**8**	**9**	**10**
11	**12**	**13**	**14**	**15**
16	**17**	**18**	**19**	**20**

Explain the following game rules to all participants:

- each team must try to decode the letter(s) behind number 4 and number 11
- each team starts with a playing bank of $20,000
- buying a letter "behind" a number is only way to decode the numbers
- each letter bought costs the team $1,000
- letters are purchased from the trainer by a spokesperson selected by the team
- there are no additional dollar points received for solving the code early
- $10,000 is earned for solving the code

Explain to all participants that they will be broken into separate teams competing to break the code, but do not give any further information

Decoder and Observers

The participants should be assigned to 2 different types of roles -- Decoders and Observers. The Decoders should not know the responsibilities of the Observers. The groups should be kept small, not exceeding more than **4-6 Decoders in each group** nor more than **1-3 Observers in total**.

Prior to beginning the exercise, separate the Observers from the Decoders to give them their instructions. The function of the Observers is to observe various group roles exhibited by the Decoders and any changes or developments within the group as a whole. The Observers should move from group to group, if necessary. It is optimal to have 1 Observer for 2 groups of Decoders. Observers should record their observations using the attached sheet as a guide. The Observers should be told that they will have a responsibility to report their observations with the entire group at the end of the exercise. Each group of Decoders will need to have a "game" recorder who will:

- explain the rules of monitor
- record the purchases
- reveal the letters in response to purchases

The recorder does not enter into the group decisions.

The Code

A	B	C	X	Y
Z	A	B	C	X
Y	Z	A	B	C
X	Y	Z	A	B

5. <u>Debrief</u> (15 minutes)

a. Ask participants to reflect back over the ToT work just completed and the exercise and look for:

- When they participated as part of the group
- How did they participate? what did they do? did they help start the activity? clarify points of others?
- What did they notice about the behavior of other participants?
- What did they notice about the behavior of the trainers?

b. Group discussion about the different roles assumed by group members:

- Allow each group's observer or other group member to give a brief summary of their observations eliciting responses to questions, such as:
  - did your group compromise or use other strategies?
  - did your group have a free-for-all throughout?
- Discuss things individuals did which addressed their task--what they are trying to accomplish as a group, such as
  - who started the discussion, what was the pattern of individual involvement, etc.
- Discuss things individuals did which addressed the group process--how they are trying to accomplish their task, such as
  - did they establish a formal or informal decision-making process, did they structure how they did their task, etc.
- Ask the group to list participant behaviors which would make it harder to accomplish group goals, such as
  - one participant dominating the group discussion, lack of participation, group member disagreeing constantly with other participants and/or trainer, etc.

6. <u>Summary</u>

a. Group dynamics and development are important considerations in managing the learning group, as well as managing one's own responses to the group as trainer.

b. Learning communications considerations and appropriate trainer involvement in a group will help equip participants to deal with some of the issues they have identified at different stages of group development.

c. Indicate that they will have a chance to practice communication skills and trainer involvement in group activities later in the session.

SESSION: ***TRAINER INTERVENTIONS*** TIME: 1 hour, 15 minutes

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: Trainer Interventions

SPECIAL MATERIALS
IN TEXT: Difficult Situations Exercise

HANDOUTS: Answers to Difficult Situations Exercise (only to group leaders) (H/O #16)
Instructions for Leading Difficult Situations Exercise (H/O Opt #16a)

RESOURCE: Trainer Interventions

OBJECTIVES:

To enable participants to:

1. Identify three (3) roadblocks to effective communication.

2. Analyze difficult training situations and offer appropriate ways of handling difficult situations.

KEY POINTS TO COVER:

1. Effective Communication (30 minutes)

   a. Importance of Effective Communication (solicit responses from group)

      - enables trainer to make training as relevant to participants' needs, as possible
      - facilitates a positive learning environment
      - encourages participants to share from their common experiences
      - helps maintain high energy level for trainer and audience

   b. Roadblocks to effective communication (solicit responses from group)

      - nervousness of trainer
      - participants are present solely because they are required to be
      - trainer consumed with "getting through the material"
      - one or very few training techniques
      - trainer's short, curt, or inappropriate response to a participants question
      - trainer ignoring a problem in the group that effects others' ability to learn

c. Keys to effective communication

- active listening
- effective feedback
- "I messages"
- effective body language
- eye contact

d. Trainer's Role -- group discussion

- ask participants to identify things trainer said that hindered effective communication
- ask participants what effect the trainer's responses had on the speaker
- ask participants what the trainer can do to contribute to a safe learning environment
  - treat participants with <u>respect</u>
  - do not blame, reject, or make participants feel guilty
  - foster openness to change, not resistance
  - enhance self-esteem, instead of triggering hurt feelings, resentment, or retaliation

e. Active Listening -

- restating what you heard as well as what you sensed the other person was saying
- show interest; personal contact, as appropriate
- show understanding; repeat or restate for clarification, as needed
- let them know you hear them
- use non-judging words - let them know you are not judging them

f. "I messages"

- describe behavior you have observed
- state your feelings about that behavior
- state the tangible, concrete effect of that behavior on you (consequences)

g. Identify ways of dealing with common behaviors that were discussed in group development session

- dominator
- passive-aggressive complainer
- disrupter
- non-participator
- leaving early, coming late, not doing homework

2. Handling Difficult Situations Exercises (30 minutes)

   a. A list of hypothetical difficult situations can be found in the ToT Participant's Manual text.

   b. Difficult Situation Exercises can be used in a variety of ways; time probably will not permit going through all exercises; choose those you wish to use or allow participants to make their own choices.

   c. ALTERNATIVE 1: One participant plays the role of the trainer who is responding to the situation or critiquing a presentation; 1 or 2 participant(s) plays the role of the trainee. The participant/trainer is then critiqued by the NTP trainer and other participants. It is useful to have the participant/trainee comment on how s/he felt about what was said and what might have been done differently

   d. ALTERNATIVE 2: Use the exercises as discussion points from which to deduce the elements of successful feedback in problem situations.

   e. ALTERNATIVE 3: Ask two participants to lead a discussion based on the difficult situations.

3. During Alternative 1, look for:

   a. Did the role-play trainer's statements in difficult situations include a clear statement of behavior?

   b. Did the role-play trainer use active listening where appropriate?

   c. Was the body language and/or use of eye contact helpful?

   d. Did the role-play trainer use effective "I messages"?

   e. Did the role-play trainer begin dealing with the problem situation early enough?

   f. Would role-play trainer's behavior lead to problem solving?

4. Debrief Alternative 1 exercise (15 minutes)

   a. Encourage presenters to express how they responded emotionally to the difficult situations they handled.

   b. Ask all participants what went well and what did not; and what things blocked the discussion.

   c. Refer participants to text on Practice Tips, specifically the section on "Using Questions."

SESSION: *INDIVIDUAL PRESENTATIONS AND VIDEO REVIEW* TIME: Approx. 3 hrs

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: None

MATERIALS/ EQUIPMENT:
Flipchart stand and Flipchart
Camera/VCR (see the special note)
Television Monitor (optional)
Videotapes
Need breakout room with duplicate equipment and adequate seating

SPECIAL MATERIALS IN TEXT:

HANDOUTS:
Presentation Preparation (part of pre-ToT mailer)
Participant Critique Forms (H/O #14)
Partner/Presenter Critique Forms (H/O #13)
Encore Presentation Partner Critique Form (H/O #20)

RESOURCE: Training Techniques

OBJECTIVES:

1. To provide participants an opportunity to practice and begin incorporating presentation tips that they have learned in ToT about preparing for and conducting a lecture.

2. To provide an opportunity for participants to receive immediate feedback on their presentations from the trainer(s) and their co-participants and, as appropriate, constructive suggestions on how they might improve.

KEY POINTS TO COVER:

1. Materials Preparation (the night before)

   a. (If the agenda allows) The night before the presentations are done, participants should be encouraged to take flipchart paper and markers with them as they prepare for their presentations. Participants should have brought any other materials with them to the training.

2. Introductory Comments (10 minutes)

a. Set up the guidelines for the presentations. Post on flipcharts in each room.

b. Pass out the critique forms. Each participant should have enough to critique all the presentations s/he will observe.

c. Discuss the guidelines for critiques. How to do it and what to critique. (See Flipcharts)

FLIPCHART:

CRITIQUE the LECTURE on the FOLLOWING

Content
- organization
- right amount of information
- identify main points
- presentation style - good match for material
- appropriate use of acronyms and jargon
- strong opening and closing

Style
- body language, mannerisms
- clarity
- use of visual aids
- volume, pace, tone
- relationship with audience
- eye contact

2. Preparation for Partner/Presenter Critique (10 minutes)

a. Immediately before doing the presentations, participants should be paired (with the person sitting next to them) to discuss the particular aspects of their presentation that they want to focus on most and their learning goals.

b. The partners will observe and note for these things in particular. Allow 7 minutes for the discussion.

c. Participants should use the "Presentation Preparation" sheet mailed to them prior to the training as a benchmark for their discussions with their partners.

3. Presentations (Varies - calculate 15 minutes per presenter in the large group)

a. Depending on the size of the group, presentations will either be done in 1 or 2 groups.

b. 1 group, if 6-10 participants; 11 or more - 2 groups.

c. Presentations are **5 minutes** each.

d. Following each presentation -

- ask participant to offer a self evaluation
- feedback should be given by the presenter's partner, other participants and the trainer(s).

e. The written participant critiques should be given to the presenter (at his/her option)

f. Feedback should not exceed (5-7 minutes) per person, depending on size of group.

4. Review of videotaped presentations (30-90 minutes). This is optional and is best done in the evening.

   a. Led by NTP trainer -- at least 5-7 minutes per person. Can be done individually or in a group depending on the presenter's preference

   b. Trainer critiques performance by stopping tape at appropriate times

****Special Note****

* The goals of individual video review are to help the participant learn to critique her own performance, give constructive criticism about delivery style, and teach the use of video review as a training technique.

* It is helpful to make it a social occasion by arranging for snacks and sodas or otherwise setting an informal atmosphere.

* Offer the tape to the sponsor if there is interest in the tape and insufficient time to view it.

* Consider <u>not</u> videotaping if no time is set aside to review the tapes.

SESSION: *CONFERENCE COORDINATION AND PLANNING* TIME:30 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: Training Evaluations
Room Set-Up Diagrams

HANDOUTS: NTP Substantive Training Evaluation Forms (H/O #23)

RESOURCE: Evaluations: Measurable Outcomes Conference Coordination

OBJECTIVES:

To enable participants to:

1. Identify the logistical arrangements that can enhance or undermine the substantive content of a training.

2. Identify the impact room set-up has upon communication within a group

3. Identify at least one appropriate low-cost training tip

4. Identify 3 elements in constructing an effective evaluation

KEY POINTS TO COVER:

1. Transition (5 minutes)

   a. Conference coordination is an attitude, not merely a collection of tasks.

   b. A brilliant training design and talented trainers are of little value if conference coordination is poor.

2. General Discussion

   a. Ask participants for examples of how logistics and conference planning have affected this training event and others they have attended.

      • encourage both positive and negative examples

   b. Ask ToT conference coordinator to share examples of problems which arose during planning (alert the coordinator ahead of time)

FLIPCHART

CONFERENCE PLANNING TIPS

Three Certainties

Everything costs more
Something will go wrong
Everything takes longer

Three Rules

Plan in advance
Walk it through
Bring it with you

3. Conference Logistics

a. Planning

b. Low-Cost Training Tips

- Using a Flipchart, offer tips from your own experience and solicit ideas from the group, depending on time and group interest.
- Ideas Include:

  - ➢ ***Multi-level registration fees***: Consider a fee for private attorneys, a reduced fee for *pro bono* attorneys and no fee for Legal Services advocates.
  - ➢ ***Co-sponsorship***: A co-sponsor may be able to provide free meeting space, use of their bulk mail permit, or other services or materials which help share expenses as well as work.
  - ➢ ***Self-mailer***: Use self-mailing announcements to avoid envelope costs. Take a sample to the post office to make sure it can be sent as a self-mailer. It can be mailed either folded or flat.
  - ➢ ***In-house***: Plan ahead and photocopy documents in-house using volunteers or even hiring children of staff. Consider having the work done on Saturdays or evenings to avoid interrupting the usual work flow.

c. Meeting Room Styles: Impact on Training

- Refer to the ToT manual for the room set-up sheet.

- Pose 5 or 6 of hypothetical training situations and ask the group to select the best room set-up style for each given situation.

- Discuss why some set-ups work or do not work for certain group sizes or types of interactions or training goals.

FLIPCHART:

ROOM SET-UP
COMFORT CALCULATION
space per person

Conference Style	23.0 - 25.0	sq. ft.
Classroom	15.0 - 17.0	" "
Theater	9.0 - 10.0	" "
Reception	.5 - 9.5	" "
Meals	11.5 - 12.5	" "

# of people x sq. ft. per person = total sq. ft. needed

4. How to Select Trainers: appropriate given particular audience, training objective and general circumstances?

   - What type of presenter is needed?

     - trainer vs. facilitator vs. subject
     - matter expert vs. "political" choice/"drawing card"
     - presentation skills and style - direct observation?
     - talk to others?
     - credibility
     - availability

5. Evaluations

   a. Review NTP substantive training evaluation form as a model
   b. Discuss significance of 5-point spread in gleaning most feedback from participants
   c. Discuss purpose of statistics and written comments on evaluations
   d. Discuss the use of pre and post-tests - Illustrate with the NTP demographic sheet and the NTP evaluation
   e. Refer participants to Resource Material section on Evaluations

SESSION: ***TRAINING DESIGN*** TIME:1 hr 30 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT:	"Training Design, Materials, and Technical Assistance"
HANDOUTS:	Training Design Guidelines & Worksheet (H/O #18)
SPECIAL MATERIAL IN TEXT:	Refer back to "Choosing Training Techniques"
RESOURCE:	None
MATERIAL ONLY FOR TRAINERS:	Field Trainer Plans/State Plans (sent to trainer)

OBJECTIVES:

To enable participants to plan a local training event with a design that is appropriate to the audience and the training goals, audience needs, and trainer's style.

KEY POINTS TO COVER:

1. Transition: Recap points about adult learning, selecting training techniques, and post-training retention.

2. Emphasize that the training design should be directed by the *objectives* of the training; that is, whether to change knowledge, skills, or attitudes. It is not the agenda but rather identification of the objectives that should be the first step.

   ➢ Walk through the "Training Design Guidelines" in the text, prior to reviewing the "Training Design Worksheet."

****Special Note****

- If your training is conducted in the 3-day format, you may want to point out the "Training Design Guidelines and Worksheet" on the evening of Day 2 so that participants may begin working on their training ideas prior to the class exercise.

3. Design Exercise (60 minutes)
   This exercise may be conducted in one of three ways -- the small groups alternative is preferred especially if combined with a large group example first.

- illustrate the process and use of the worksheet. Incorporate other participants' variations and issues as appropriate

- Individually - explain the elements of training design and how to use the worksheet. Ask the participants to use the time to plan a training they will conduct in the next 4-6 months. Circulate among the participants as they work.

- Small Groups - explain the elements of training design and how to use the worksheet. Go around the room and have participants share the types of training they are developing and would like to work on for this session. Break the participants into small groups based upon common training plans and topics. If there are two groups, one trainer should act as a resource person to each group. If more than 2 groups, the trainers should circulate.

****Special Note****

* If the group is broken up, ensure that there is adequate time to come together as a full group and briefly report on the plans. This can be used as a transition to the round robin described in the closing session.

Walk full group through the "Training Design Worksheet." Instruct participants to begin design by focusing on the following talking points:

a. Learning objectives - Discuss the elements of a good objective. Practice writing a few objectives.

   - Type of training needed: What type of change is desired? (knowledge, skills, attitude)
   - Discuss merits and role of a design team

b. Participants:

   - estimated number
   - needs assessment (informal or formal)
   - audience background?
     - lawyers - legal services, pro bono lawyers, private bar, others?
     - non-lawyer advocates
     - community groups
     - other agencies
     - experience levels (including other training)
     - differences and similarities in experience levels
     - job responsibilities - possible to tailor existing training programs if job duties require something different; helps analyze training needs

- Identify all those who might benefit from such training - there are many combinations of possible participants.

  - by job description
  - by experience levels
  - by expected future needs of advocates
  - by projected needs of clients

c. Date and time of training - conflicts? other trainings? travel time?

d. Location of training - adequate facility? Diversions and other attractions -- is this an issue? Costs? How much detail needs to be in the publicity?

  ➢ geographical location

    - participants' geographical location is an important consideration in deciding where to hold training, how long the program should last, whether to have one large training program or more than one smaller programs.
    - is there a central city, easily accessible from most areas of your state?
    - if not, you might consider several locations and traveling road show presentation format, or any other format that meets particular local needs.

e. Materials to be Used in Training --

Will they use NTP materials and design? Review the options described in the text. Review the NTP substantive law, advocacy skills and hypothetical cases available.

  ➢ Discuss materials needed:
    - written (by whom)
    - printed (by whom)
    - ordered (from whom); or
    - copyright permission obtained (by whom)

f. Appropriate Training Techniques - especially important if they are not using NTP materials (or modifying them);

  - need to look at the topics, separate it into discreet segments, and decide how to present each section.
  - review the objective for each segment and match the techniques chosen to the objective
  - balance the training techniques; consider the overall pattern; vary the techniques. Refer to the "Training Techniques Plotting Chart" in the text under Session 3 "Training Techniques" in the Participants Manual.

4. Begin discussion of conference coordination considerations and planning questions

   a. Where do you begin to plan such training? Who should be on the design team?

   b. Decide which location and format are best, given your time, money, and trainer resources

****Special Note****

* As participants share information about their training plans both with the large group and in their small groups, the trainer should take note of this information and record on the "State Training Plans" form to be returned to NTP Training Coordinator for NTP follow up -- Such as:
    - technical assistance in planning the event

    - NTP substantive training modules and hypothetical cases free of charge

SESSION: *NTP TRAINING MATERIALS & TECHNICAL ASSISTANCE* TIME: 20-30 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: "NTP Design"

HANDOUTS: *trainingworks* (H/O #10)
Training Library Booklet (H/O #12)
NTP Technical Assistance (H/O #7)
sample NTP Substantive Law Training Module (optional)
sample NTP Hypothetical Case and Trainer's Notes (optional)
FAST TRACK Training Series (H/O #24)

RESOURCE: General Resources

OBJECTIVES:

1. To inform participants of the materials and technical assistance that are available to field trainers through NTP.

2. (optional) To familiarize participants with the uses and overall content of a sample NTP Substantive Law Module, and sample NTP Hypothetical Case and Trainer's notes.

KEY POINTS TO COVER:

1. Technical Assistance

   a. Summarize and review the "Post Training Technical Assistance and Free Materials." Emphasize NTP's ongoing effort to support the training and community education activities within the elder law network.

   b. Walk participants through the Training "lending" library booklet. Summarize the materials available through the library.

   c. Inform participants that they will be added to the mailing list for *trainingworks*. *trainingworks* comes out quarterly and NTP actively solicits articles or questions from NTP-trained field trainers.

   d. Record the names of those participants who are interested in receiving the Elder Law Forum. Pass on the names to ElderLaw Forum Staff.

2. Participants should (if they haven't already) pick up 1 copy of --

   - NTP sample substantive law module and
   - NTP sample hypothetical case file and trainer's notes.

Walk through a substantive training module and a hypothetical case and trainers notes.

a. Explain how these two training materials can be integrated for substantive and skills training.

b. Emphasize:
   - Material designed for elder law advocates at a variety of levels of experience
   - Material designed for tailoring and integrating substantive law with skills development
   - Advocates may receive free multiple copies of the materials simply by contacting NTP

SESSION: ***CLOSING AND EVALUATION*** TIME: 15 mins

MATERIALS/RESOURCES/EQUIPMENT:

TEXT: None

HANDOUTS: ToT Evaluation Forms (H/O #23)
ToT Certificates (H/O #22)

RESOURCE: None

OBJECTIVES:

1. To facilitate information sharing among participants; if possible to encourage future collaboration.

2. To identify and recruit trainers for possible post-ToT off-shoot training.

3. To re-state follow-up obligations (participants and NTP)

4. To complete evaluations of the ToT program

BEFORE THE SESSION

Privately review what, if any, plans the SUA contact (usually the local sponsor) has for an "off-shoot" training. An off-shoot training is a post-ToT substantive law training for which NTP will provide materials and at least 1 NTP trainer. At least 1 field trainer from this ToT group will also participate as a trainer.

KEY POINTS TO COVER:

1. Collect Information on Future Training Plans

   a. (*optional*) Conduct a round robin in which each participant mentions at least 1 plan for future training. The trainer's role is (1) to act as a recorder and (2) to facilitate the discussion by encouraging networking, collaborative projects and information sharing among participants.

   b. Review the individual participant's "training goals" flipchart produced at the beginning of the ToT. Integrate training exercises, experiences and plans that participants shared during the session with specifics of examples demonstrated in the ToT.

c. If the SUA plans an "off-shoot" training, ask the SUA contact to announce the tentative plans and solicit participation from the group.

d. Ensure that you have information on training plans from field trainers and from SUA representative. Take notes on specific plans and pass on to NTP training coordinator for follow-up.

2. Post-ToT Obligations (Participants and NTP)

a. Thank the ToT coordinator for all his or her efforts in organizing the training.

b. Remind participants that NTP training staff is available to provide technical assistance and advice as they develop and/or conduct training in their local areas.

c. Remind participants that a condition of acceptance into the ToT program was the agreement by the participants to conduct at least 1 training in the next four months. Any training is acceptable (bar training, staff training, conference, community education, etc.)

d. Inform participants that NTP Training Staff will be contacting them within the next few months to inquire about their local training activities. NTP will circulate a form and would appreciate their completion and return of the form.

3. ToT Evaluation

a. Distribute written evaluation forms and request participants to fill in the ID section in the upper right corner. It should match whatever ID the participant used on the demographic sheet filled out at the beginning of the session.

b. Allow enough time before the end of the session to fill them out.

c. Collect evaluations as participants leave and forward to NTP. Ensure that everyone completes an evaluation.