Developing and Managing Part-Time Trainers

Part 1: The Manager's Role

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DEVELOPING AND MANAGING

PART-TIME TRAINERS

Part 1:   The Manager's Role

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PREFACE

This document was developed to respond to requests for assistance from correctional agency trainers on how to manage training programs using part-time trainers. The objective of the document is to provide a discussion guide and sequential checklist for training managers to use in developing and managing part-time trainers. A separate document, Part 2, provides a discussion guide, model lesson formats, and a sequential checklist for the part-time trainer to use when preparing to conduct training.

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PURPOSE OF THE MANUAL

This manual is a compilation and review of the issues and requirements surrounding the use of part-time and temporary persons as important elements of a training program. Part-time trainers are usually critical to the success of training efforts. Training managers are often dependent on part-timers for several reasons:

- First, for efficiency's sake, part-time trainers are less costly than full-time employees. They are paid for the time they actually prepare and teach, or, more often, part-time trainers are already employed by the agency in another full-time capacity and are not paid at all beyond the original salary.

- Second, part-time or temporary trainers are a direct link to the practitioner's world. The line staff employee or sister agency line practitioner who helps with training segments is usually an experienced worker or supervisor who has current knowledge of the training topics. This link to the worker's world adds credibility and important information to training sessions.

- Third, by using outside persons, the training agency or program gains insight and balance from offering a variety of philosophies and personal views. The periodic injection of "new blood," if handled properly, keeps training programs from stagnating.

This manual is one of two volumes. It is a guide, a resource document, and a checklist for the person who is responsible for the management, coordination, or supervision of the part-time trainer. The second volume, Part 2, is a guide, a resource document, and a checklist for the part-time trainer. Both volumes include a discussion of the issues, a sample procedure or method to follow, and a detailed checklist to use for ensuring thoroughness.

Because of the difficulty of developing and managing part-time trainers, especially those who have little training experience, this manual was prepared to help the training manager properly manage and use part-time persons. It can be used alone or with Part 2. As a whole, the two-part document serves as a tool to organize the entire training effort. As separate parts, the manager's guide gives the manager a brief but complete contracting tool, while the trainer's guide gives the trainer a checklist and resources to help design a quality training segment.

ON BEING A MANAGER

A training manager is anyone who has been issued the authority and responsibility to initiate, develop, control, monitor, and evaluate a training program. The manager may be a state training director, an agency training coordinator, a trainer assigned to develop a particular program, an agency head or supervisor who also holds responsibility for coordinating training, or any staff person temporarily assigned to start a training operation. The training manager, for our purposes, is someone who will be responsible for contracting with and managing the part-time trainer.

Generically, a manager is someone who completes tasks through the use of resources such as people, technology, and products. In our situation, this training manager must use part-time persons in conjunction with existing training tools and materials to produce an effective training program. The manager is primarily responsible for the effectiveness and impact of the complete training program. A failure of a part-time trainer is a failure for that manager. This managerial approach requires that the training manager appropriately develop and control any resources he or she has available.

To ensure success, the manager should have skills, knowledge, and abilities in the following areas:

- Organizing.

- Problem solving.

- Being accountable.

Organizing includes directing the agency resources toward the goals and objectives of the program. The following elements are examples of the organization function of a training program:

- Determine the goals and objectives.

- Locate resources (people, technology, and products).

- Put the resources together to match the program goals. An example would be to clarify expectations with trainers in contracting sessions.

Problem solving includes identifying roadblocks to successful task completion and "clearing the road" so that workers are able to complete those tasks. Examples of problem solving by the manager are:

- Resolving conflicts between trainers.

- Arranging trainee transportation.

- Developing materials and reproduction procedures.

- Scheduling time sequences to meet program and trainer needs.

Accountability duties ensure that resources are properly matched and that people meet the contractual requirements to which they agreed. Examples of the accountability function are:

- Reviewing trainers' lesson plans before the program begins.

- Monitoring classroom activities.

- Preparing and administering training session evaluations.

- Giving and receiving feedback between trainees and trainers.

- Comparing training results with the training program goals and objectives.

When dealing with part-time trainers, special managerial issues must be considered. First, trainers are often very busy practitioners who have time constraints. Because of this, training is not usually their highest priority, and contracting and actual training sessions are difficult to schedule with appropriate preparation. Second, part-time trainers are usually experienced practitioners who may or may not understand the need for proper training preparation. It is not unusual to have the younger training coordinator

contracting with the older part-time trainer/practitioner. To adapt to persons with differing levels of experience, the training manager must use a contingency style of leadership.[1] Contingency should incorporate the following:

Directive:

The manager tells or instructs the part-time trainer on the requirements of the project. This style is used with inexperienced or unwilling trainers.

Consultative:

The manager asks for input and then makes all final decisions. This style is used with inexperienced but willing trainers.

Participative:

The manager joins with the trainer in making mutual agreements and decisions. This style is used with cooperative and experienced trainers.

The training manager must use a variety of skills to successfully coordinate the available resources. Again, the manager's primary focus should be on putting together the technology, materials, and people in a positive way to meet the training program goals.

IDENTIFYING PART-TIME TRAINERS

Because this document focuses on developing and managing the part-time trainer, we will assume that the training manager has developed a systematic approach to matching resources with program goals. Figure 1, developed by Leonard Nadler, shows where obtaining instructional resources fits into the professional training design system.[2]

After needs, objectives, curriculum, and strategies have been tentatively determined, it is time to obtain the instructional resources which, in many cases, includes identifying and contracting with part-time trainers.

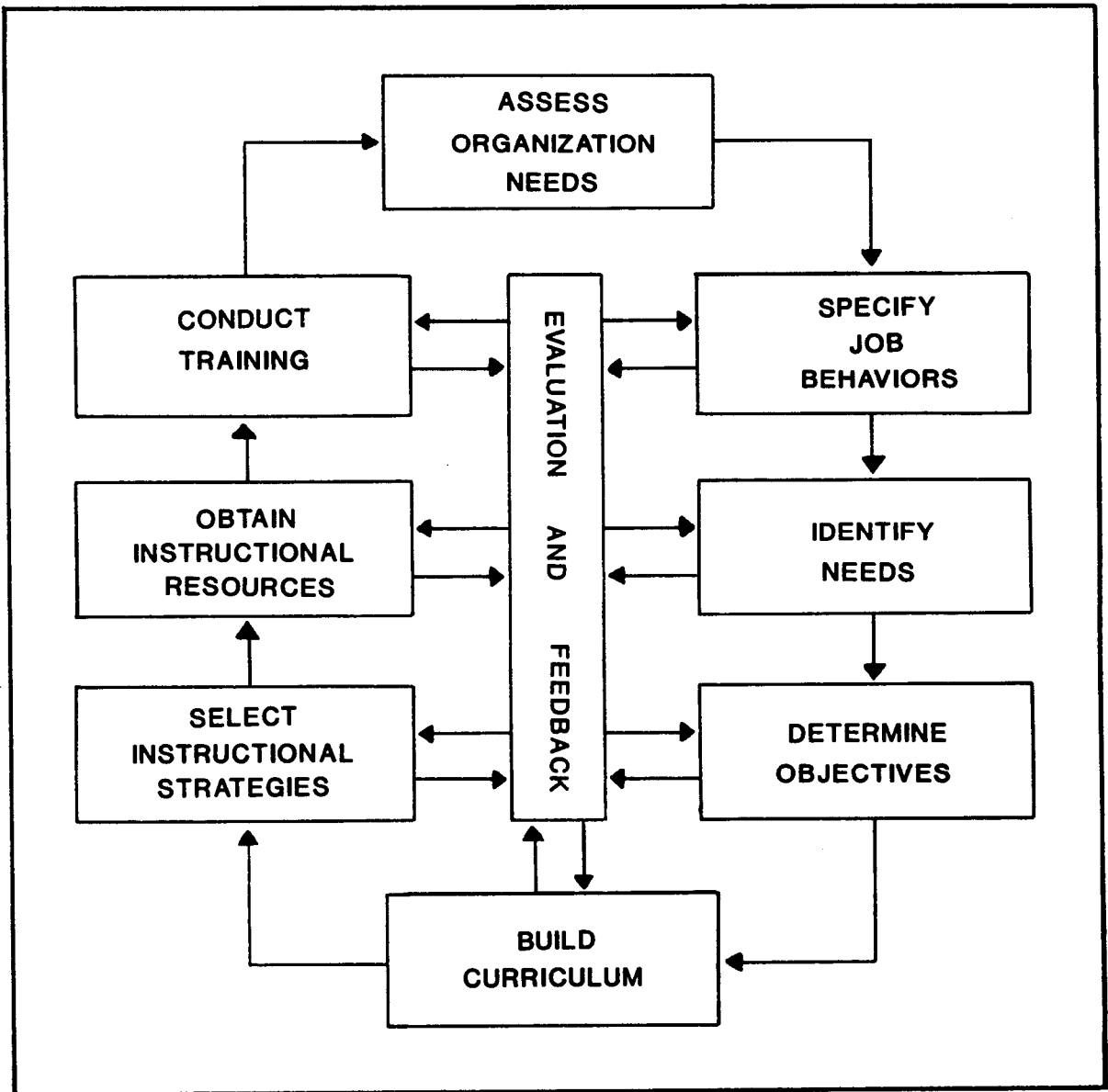The issues to consider when initiating the search for part-time trainers follow.

Figure 1.   PROFESSIONAL TRAINING DESIGN SYSTEM

Budget

Usually there are limited funds or no funds at all to hire outside trainers. The amount of money available may determine the source of trainers and may influence the trainers' commitment to the program's success. In the case of a lack of funds, creative problem solving may be the training manager's answer to the dilemma. For example, two ways to approach the money problem are to trade training time with other training managers and to trade resources with line-level supervisors.

Instructional Strategy

The instructional strategy will determine the training experience level or practitioner experience level of the trainer.[3] The training manager should determine if the trainer needs to be an experienced practitioner with the ability to offer technical information; an experienced facilitator with the ability to create a problem-solving environment; or a training assistant who knows how to operate a video playback, a movie projector, or a programmed learning system.

Availability

While we suggest that the instructional strategy determines, to a degree, the skill level of the person selected to be a part-time trainer, it is often the availability of trainers that may determine the instructional strategy. The training manager should have developed a number and a variety of training personnel resources to fit the agency's differing needs. Potential sources of part-time trainers are:

- University or college professors.

- High school teachers.

- University graduate students.

- Trainers from other corrections agencies.

- Other professionals such as lawyers, doctors, police officers, firemen, and nurses.

- Line-level supervisors or officers from your own agency.

- Inmates.

- Professional groups such as the Red Cross or Toastmasters.

TEE SELECTION PROCESS

The training manager has a responsibility for choosing and developing part-time trainers who have the ability or potential ability to be successful change agents. To take the approach of "trying out" a person as a trainer without a developmental process is to flirt with continuous program failure.

We suggest instead that trainers should be chosen on the basis of criteria that identify individuals who are more likely to develop into competent and enduring trainers. Although few people possess all the attributes of a successful trainer, certain qualities are desirable. The University of Michigan School of Social Research has identified certain traits, characteristics, attitudes, values, knowledge areas, and skills as positive criteria in choosing persons who will be educational change agents.[4] These are discussed below.

Background, Traits, and Characteristics

- High energy, commitment to work, and persistence. The part-time trainer should demonstrate a willingness to put extra effort into conducting a successful training session.

- Empathy with trainees. The part-time trainer should be concerned primarily with the benefit to trainees.

- High degree of credibility in the eyes of the trainees. The part-time trainer should be from a reference group that is easily and positively identified by the trainees.

- Perceived higher social status. The trainees should view the part-time trainer as having a higher social status than their own.

- A high education level and good ability to articulate issues. These qualities usually prepare the trainer to better understand problems, resources, and

solutions, and equip the trainer to communicate better with trainees.

- Cosmopolitan experience. Good change agents are likely to have had a broad range of experience in a variety of roles.

- Similar attributes to trainees. Evidence shows that trainers who are more similar to trainees in important attributes have more influence over those they teach than do trainers who are very different. These trainers are seen as having more empathy and understanding for the trainee.

Attitudes and Values

- Concern and interest in the educational process. The part-time trainer should believe that his or her classroom efforts will make a difference in the personal and professional behavior of trainees.

- Interest and willingness to assume the role of a change agent. The part-time trainer should be committed to becoming a valued part of the educational process.

- General interest in continuing personal growth of self and others. The part-time trainer should view the training experience as both an opportunity for self-growth and for helping others to grow.

Knowledge

- The part-time trainer should have a clear understanding of human needs and values and how they affect different people.

- The trainer should understand how systems work and how training fits or does not fit into a system.

- The trainer should have some knowledge of the problems, limitations, and needs of education.

Skills

- The part-time trainer should have human relations and communications skills and be able to relate to people at various work and educational levels.

- The trainer should have basic skills in organizing, putting people to work in problem-solving teams, and controlling or leading a group of people.

- The trainer should have conflict-resolution skills and understand why and how people or systems resist change.

- The trainer should be able to convey skills, knowledge, and values to others.

To create a development program for the trainer, the manager need only look for signs of these trainer attributes. In summary, the major goal of the selection process is to promote the long-term development of the part-time trainer.

CONTRACTING

The most critical, probably most difficult, but most elemental stage of managing the part-time trainer process is the development of a formal or informal contract between the manager and the trainer.

Contracting is the most important facet of making arrangements for the part-time trainer. It is both a process and a tool to ensure that expectations and responsibilities on both sides are clear. A contract also establishes criteria for monitoring and evaluating progress.[5]

Initially, the manager uses contracting as a process to explore and clarify the relationship between the manager and the potential part-time trainer. The manager details his or her expectations, training goals, organizational needs, and personal desires, while the part-time trainer details his or her skills, services, and personal and professional goals or needs. During the process, the parties decide on specific items.[6] These are:

1. What the manager and part-time trainer want from each other.

2. Whether they have the ability and resources to provide what is wanted in the relationship.

3. Whether they are willing to enter into the relationship.

Second, the manager and trainer use contracting as a tool. The contract becomes a method of negotiating the following elements:

1. Mutual establishment of program goals and objectives.

2. Mutual decisionmaking concerning instructional strategies.

3. Agreement on when to return to the contracting process, where to establish review and decision points that are necessary for monitoring project development, and how to thoroughly evaluate the training results.

One advantage of the contracting process is that it allows the manager and trainer to clarify and expose their personal agendas as early as possible in the relationship. The process also establishes clear responsibilities for each party. Potential conflicts are exposed before they arise or are brought up for discussion at a time when they are easier to solve.

One disadvantage of early contracting is that the potential trainer may not be fully prepared or knowledgeable about potential difficulties or requirements. He or she may feel compelled to accept responsibilities that may be too difficult to carry out when the time comes to complete those tasks.

To ensure that the part-time trainer does not feel trapped by a premature contracting process, the manager should emphasize that the contract can be revised at any time and that it may be completed in stages as the trainer develops a familiarity with the system and requirements.

Described below are important stages or sample methods of developing the contract, both as a process and as a tool.

Initial Contact

Because the part-time person will usually be working at another agency or organizational unit, it may be important to meet the potential trainer at his or her location.

Meeting in the trainer's work environment sends a signal to that person that he or she is an important part of the process. It also establishes an attitude of respect for the position he or she will hold.

The time to establish the credibility of both parties and to let both people get to know one another is during the initial contact.[7] As familiarity develops, each person will be able to express his or her needs and expectations for the agreement.

It is critical that, during the initial contact, the manager establish the importance of the contracting process and that both parties agree to abide by the contract.

Responsibility Charting

Responsibility charting is a technique for identifying important tasks and decision points in the agreement.[8] It is commonly termed the responsibility or decision method. Together, the contracting parties identify the tasks to be completed and determine their respective responsibility for each task. The following steps should be taken :

1. Identify key tasks.

2. List participants involved.

3. Create responsibility chart.

4. Identify degrees of participation.

5. Review as program progresses.

A sample responsibility chart is given in Figure 2. After responsibility is designated, agreed upon, and recorded, the actual - tasks may be initiated by the manager through an agreement process with the trainer. The following tasks and issues should be discussed:

● Values of the training agency.

● Coals of the training program.

● Agency's expectations of the trainer's personal and professional behavior.

● Administrative structure of the training agency, including procedures for obtaining support and assistance.

Figure 2.   SAMPLE RESPONSIBILITY CHART - TRAINING SEGMENT

TASKS	PARTICIPANTS R = Responsible to complete task A = Approval before implementation C = Consulted before implementation I = Informed after completion			
	TRAINER	MANAGER	SUPPORT TRAINER	SUPPORT SECRETARY
1. Establish Goals	I	R	C	I
2. Establish Objectives	R	A	C	I
3. Prepare Lesson Plan	R	A	I	I
4. Procure Equipment	A	I	R	I
5. Develop Materials	R	I	C	I
6. Prepare Final Materials	A	I	I	R
7. Determine Presentation Strategy	R	A	I	I
8. Conduct Training Presentation	R	I	I	I
9. Evaluate Training Effectiveness	A	A	R	I
10. Adjust Training Program Based on Feedback	C	R	C	I

- Limitations and abilities of the support staff, the support equipment, and support budget.

- Manager's personal expectations of the training program process and results.

- Trainer's personal and professional needs.

- Trainer's time constraints.

- Trainer's payment expectations and understanding of the agreement.

- Evaluation and feedback mechanisms.

- Future programs and potential trainer responsibilities.

Contract Closure

The contract is an instrument designed to record agreements between parties and to ensure that a process is available to review or renegotiate those agreements. The manager and trainer must leave the contracting session with a final, important understanding that:

- The contract can be reviewed at the request of either party.

- The contract will be periodically reviewed to ensure continued agreement and compliance.

- The contract will be completed unless it is renegotiated.

- A new contract will be negotiated at the end of the current agreement if both parties wish to continue the training arrangement.

LOGISTICS

The manager faces a special problem when working with the part-time trainer. Permanent, full-time trainers and training support employees are fully familiar with the basic logistics and support systems available, but the part-time trainer often does not know the first thing about the training environment. Because of these differences, it is essential that small issues (such as parking spaces) do not become major concerns of the trainer. The manager must ensure

that these potentially disturbing factors are minimized for the newly acquired employee or volunteer.

Logistical matters of importance are:

Training Environment

    Room arrangement
    Participant lists
    Lesson plan format
    Audiovisual equipment availability
    Audiovisual equipment location
    Movies, filmstrips, slides
    Flip chart stands, paper, markers, and
      other materials in supply
    Classroom aides and assistance
    Breaks, lunch time policies
    Smoking or no smoking policy
    Absentee policy
    Trainer dress code
    Trainer parking arrangements
    Available telephone, message center
    Janitor or maintenance assistance.

Support Staff

    Names and responsibilities of clerical
      support
    Typing, copying available to part-
      time trainer
    Phone numbers, addresses of contact
      persons
    Procedures for obtaining materials
      and audiovisuals
    Classroom support - conference aide
    Sample handouts.

Course Development

    Format for writing performance
      objectives
    Lesson plan philosophy, content
    Lesson plan format
    Test construction procedure, format
    Copy of agenda
    Evaluation procedure
    Feedback procedure
    Follow-up meetings.

MONITORING AND EVALUATION

The monitoring, evaluation, and feedback functions are critical elements of the manager's role in developing a new part-time trainer. The major purpose of obtaining information from trainees or other training participants is to improve the classroom results.

A manager's goals in evaluating a trainer are to:

1. Determine if the trainer has performed effectively.

2. Determine if the trainer is able to improve his or her training delivery.

3. Determine if there are training support issues that can be improved to promote better learning conditions.

4. Give the trainer and the training manager the feedback necessary for them to initiate the renegotiating or recontracting process.

The monitoring and evaluation process should be based on an organized approach that begins with the course goals and ends with the recontracting session. This systematic approach is illustrated in Figure 3.

Actual teaching duties usually break out along these lines: The manager is responsible for the course goal, while the trainer is directly responsible for developing performance objectives and lesson plans. However, monitoring and testing design call for collaboration. A joint effort in this stage of the process should ensure responsibility and commitment by both parties when the recontracting process takes place.

Monitoring and Evaluation Strategies

Student Feedback through Group Leaders. In this strategy, the training class is periodically divided into small groups. Each group chooses a spokesperson and gives that person feedback for the instructor and training manager. The spokespersons then meet with the trainer and training manager to relay the information.

Classroom Monitor. The training manager assigns a support staff person or permanent trainer to monitor the training sessions. The staff person serves as a feedback source for the trainer and the training manager.

Evaluation Instruments. Although numerous samples of standard training evaluation instruments exist, it is likely that the training manager will be issuing a standard form at each training session. However, it may be more advantageous to have the trainer design a student feedback form.

Evaluation Testing. Evaluation testing consists of much more than superficially obtaining student feedback. Testing requires that test questions be developed that directly reflect the performance objectives and the lesson plan content that were created before the training program was initiated.

Although there are many forms of testing, multiple-choice questions are favored over most methods. When skills are to be measured, behavior-observed testing may be the preferred method. In any case, the test should be well constructed, measure what is intended to be measured, and directly reflect the performance objectives.

FEEDBACK AND RECONTRACTING

The typical training manager is adept at collecting important information on a trainer's performance, but the manager must have skill in relaying feedback in a constructive way to ensure that the trainer fully benefits from a feedback and recontracting session.
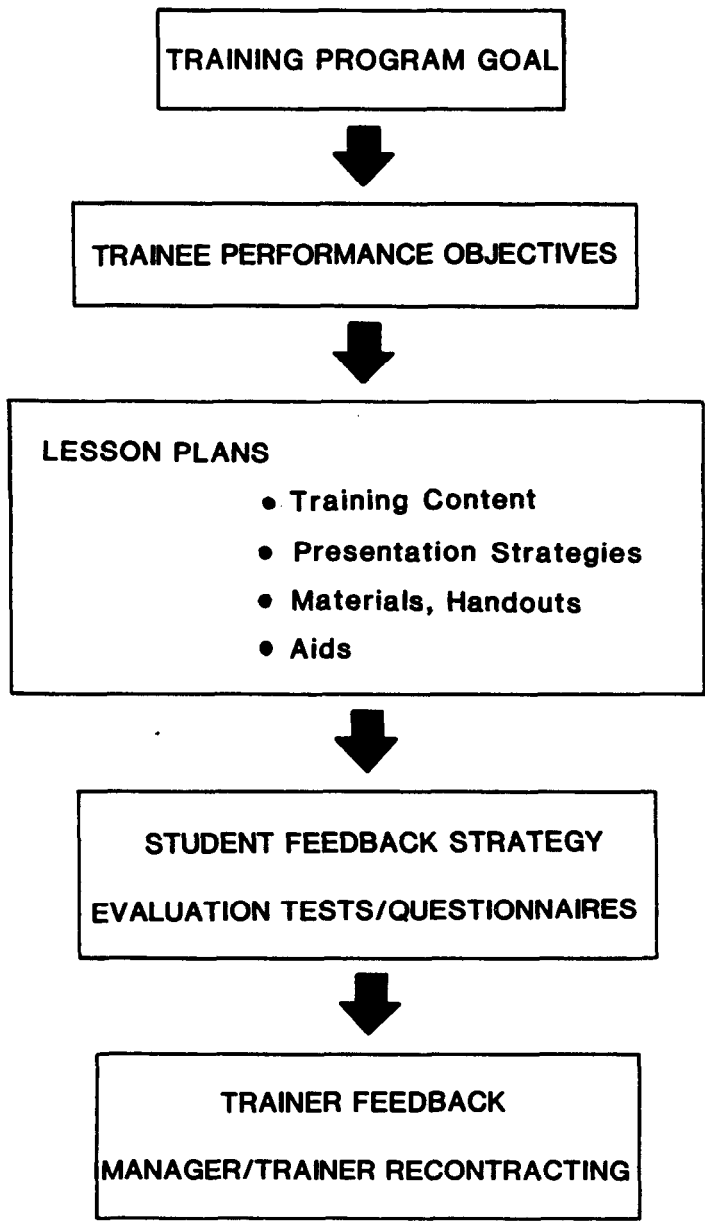
Some guidelines for using feedback positively are presented below.[9]

The Information Exchange Process. The manager should focus on the trainer's intentions only and not on perceived behavior.

Direct versus Indirect Expression of Feelings. The manager should state directly to the trainer how he or she is reacting to the evaluation reports or trainee feedback process. The information should be clearly communicated without evaluative statements.

Descriptions versus Interpretation of Behavior. The manager should describe the trainer's actions, classroom preparation, and behavior without interpreting or guessing why the instructor behaved in a certain way. It is the trainer's role to interpret his or her behavior.

Non-Evaluative versus Evaluative Feedback. Again, the manager should relay behaviorally based information in an objective manner. Although the manager may eventually be required to judge the trainer, the feedback session should be limited to

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                    ┌─────────────────────────────┐
                    │  TRAINING PROGRAM GOAL       │
                    └─────────────────────────────┘
                                 ⬇

            ┌───────────────────────────────────────┐
            │  TRAINEE PERFORMANCE OBJECTIVES        │
            └───────────────────────────────────────┘
                                 ⬇

      ┌─────────────────────────────────────────────┐
      │  LESSON PLANS                                │
      │                                              │
      │           ● Training Content                 │
      │                                              │
      │           ● Presentation Strategies          │
      │                                              │
      │           ● Materials, Handouts              │
      │                                              │
      │           ● Aids                             │
      └─────────────────────────────────────────────┘
                                 ⬇

        ┌───────────────────────────────────────┐
        │     STUDENT FEEDBACK STRATEGY          │
        │                                        │
        │  EVALUATION TESTS/QUESTIONNAIRES       │
        └───────────────────────────────────────┘
                                 ⬇

        ┌───────────────────────────────────────┐
        │        TRAINER FEEDBACK                │
        │                                        │
        │ MANAGER/TRAINER RECONTRACTING          │
        └───────────────────────────────────────┘
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Figure 3. MONITORING AND EVALUATION PROCESS

non-evaluative information. Roth parties will have the opportunity to mutually determine changes in behavior during recontracting.

Specific versus General Feedback. To know how to change his or her behavior, the trainer will need specific information. General information only tends to confuse the issues.

Freedom of Choice to Change versus Pressure to Change. Every effort should be made by the manager not to pressure the trainer. Emphasis should be on information flow. Changes should be reserved for recontracting time, at which point decisions are made mutually.

Immediate versus Delayed Timing. Feedback should follow the training program or segment as soon as possible so that the trainer is able to relate the information to his or her behavior.

Solicited versus Imposed Feedback. The manager has the right to impose feedback on the trainer, but every effort should be made to create an open and nonthreatening situation that allows the trainer to ask for feedback.

Motivation to Help versus Motivation to Hurt. The manager's role is to assist the trainer to grow personally and professionally. Even though poor performance creates an angry situation, the manager's role is not to degrade or hurt the trainer.

A positively designed feedback session between the manager and the part-time trainer should create a positive atmosphere for their next recontracting session. By receiving clear, constructive information, the trainer will be more likely to attempt personal behavior change and to improve the training program.

If a situation arises in which the part-time trainer's performance is so poor that he or she should not be rehired, the clear feedback and evaluation process helps the manager to explain honestly the reasons for termination.

SUMMARY

Figure 4 provides a training manager's checklist as a management tool for developing and supervising part-time trainers. Administrators will find that the step-by-step procedures outlined can help them grapple successfully with the job of running a training program.

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Figure 4. MANAGER'S PART-TIME TRAINER CHECKLIST

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
1. A training program has been designed that may require the use of part-time trainers.					
2. The budget requires that a low-cost, part-time trainer be selected.					
3. The instructional strategy of the program requires an outside practitioner.					
4. The training program could benefit from the perspective of an outside trainer.					
5. My agency has practitioners who may gain professional growth by serving in this program as part-time trainers.					
6. I have been assigned the role of training manager for this training program.					
7. I have been given the authority and responsibility necessary to serve as a training manager.					
a. I understand that I should combine resources in people, materials, and technology to carry out this program.					
9. I have reviewed the situations in which I should be directive, consultative, or participative when contracting with a part-time trainer.					
10. I have reviewed the necessary skills for organizing, problem solving, and maintaining accountability of staff.					

Figure 4. MANAGER'S PART-TIME TRAINER CHECKLIST (continued)

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
1. The needs and goals of the training program have been determined.					
2. Resources have been checked for availability of part-time trainers. Potential resources are: a. University professors. b. High school teachers. c. University graduate students. d. Trainers from other agencies. e. Other professionals. f. Line-level supervisors or officers. g. Inmates. h. Professional groups - e.g., Red Cross, Toastmasters.					
13. A part-time trainer has been chosen who meets the following criteria: a. Background, traits, and characteristics. 1) High energy level. 2) Empathy with trainees. 3) Credibility with trainees. 4) High social status with trainees. 5) High educational level and articulation skills. 6) Cosmopolitan experience. 7) Similar attributes to trainees. b. Attitudes and values.					

Figure 4. MANAGER'S PART-TIME TRAINER CHECKLIST (continued)

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
1) Concern and interest in the educational process.					
2) Interest and willingness to be a trainer.					
3) General interest in personal growth of self and others.					
c. Knowledge.					
1) Understanding of human needs and values.					
2) Understanding how systems work and the relationship of training to systems.					
3) Understanding of problems and limitations of education.					
d. Skills.					
1) Ability to relate to people at various work and educational levels.					
2) Ability in human relations and communications.					
3) Adept at organizing work groups.					
4) Ability to resolve conflicts.					
5) Adept at counteracting resistance to change.					
6) Ability to convey skills, knowledge, and values to others.					
14. A contracting date and location have been arranged.					
15. The initial contracting meeting was conducted in a way that allowed both parties to be open.					

Figure 4. MANAGER'S PART-TIME TRAINER CHECKLIST (continued)

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
a. The contract process is agreed upon.					
b. The parties agreed to continue the process.					
16. A responsibility chart has been completed.					
a. Key tasks identified.					
b. All participants identified.					
c. Degrees of participation identified.					
17. Contract issues have been discussed and agreed upon.					
a. Training agency values.					
b. Training program goals.					
c. Expectations of trainer's behavior.					
d. Training agency structure and support procedures.					
e. Limitations and abilities of the support staff.					
f. Trainer's personal and professional needs.					
g. Trainer's payment fee agreement.					
h. Evaluation and feedback mechanisms.					
i. Future programs and trainer's potential responsibilities.					
18. The contracting process was closed with the agreement that the contract can be re-negotiated at the request of either party.					
a. The contract will be reviewed periodically.					
b. The manager and the trainer assume their re-spective responsibilities delineated in the con-tract.					

Figure 4. MANAGER'S PART-TIME TRAINER CHECKLIST (continued)

TASKS	YES	NO	PARTIALLY	NOT SURE	ACTION

19. The trainer understands the logistical elements of the training process.
 	
a. Training environment.
 	
    1) Room arrangement.
    2) Participant lists.
    3) Lesson plan format.
    4) Audiovisual equipment availability.
    5) Audiovisual equipment location.
    6) Movies, film strips, slides.
    7) Classroom aides and assistance.
    8) Materials in supply.
    9) Breaks, lunch time policy.
    10) Smoking policy.
    11) Absentee policy.
    12) Trainer's dress code.
    13) Trainer's parking arrangement.
    14) Available telephones, message center.
    15) Janitor or maintenance assistance.
 	
b. Support staff.
 	
    1) Secretaries' names, responsibilities.
    2) Typing, copying, clerical support available.
    3) Procedures for obtaining materials and clerical support.
    4) Classroom support - conference aide.
    5) Permanent trainer assigned to assist.
    6) Sample handouts.
 	
c. Course development.					

Figure 4. MANAGER'S PART-TIME TRAINER CHECKLIST (continued)

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
1) Format for writing performance objectives.					
2) Lesson plan philosophy, content.					
3) Lesson plan format.					
4) Test construction procedure, format.					
5) Copy of agenda.					
6) Evaluation procedure.					
7) Feedback procedure.					
8) Follow-up meetings.					
20. Student-based feedback strategy has been developed.					
21. Training evaluation process has been designed.					
22. Trainer's feedback instrument has been designed.					
23. Training program monitoring strategy has been designed.					
24. Training program has been completed.					
25. The manager/trainer feedback session has been completed.					
26. Program closure.					
a. The manager/trainer recontracting session has been completed.					
b. The trainer has been terminated with no recontracting session.					

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1. Contingency management or situational leadership theory is adapted from several sources. For a more thorough discussion, see the <u>Detention Reporter</u> (monthly newsletter), CRS Inc., Kents Hill, Maine, Volume 4, February 1984.

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Part 2: The Trainer's Role

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DEVELOPING AND MANAGING

PART-TIME TRAINERS

Part 2: The Trainer's Role

Developed by

Paul Katsampes, Ph.D.

April 1984

PREFACE

This document was developed to respond to requests for assistance from correctional agency trainers on how to manage training programs using part-time trainers. The objective of the document is to provide a discussion guide, model lesson formats, and a sequential checklist for the part-time trainer to use when preparing to conduct training. A separate document, Part 1, provides a discussion guide and sequential checklist for training managers to use in developing and managing part-time trainers.

Valuable assistance and direction were given by:

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CONTENTS

RESPONSIBILITIES OF TEE PART-TIME TRAINER

The part-time trainer may be the backbone of an organized training effort. The part-time trainer represents a link with the practical world and has many other valuable qualities. For example, he or she is viewed as a credible person with line-level workers, serves as a testing resource for new ideas, and contributes as a work-experienced specialist in selected topic areas.

To assume the role of a part-time trainer is to take on important responsibilities that are critical to the success of the training program. While having the opportunity to train may be professionally rewarding to the practitioner, the bottom line of training is how much trainees learn.

The inexperienced part-time trainer must be able to overcome his or her deficiencies in training expertise, while, at the same time, capitalize on the strengths of his or her practical experience. Poor-teaching results in the loss of an important organizational resource. There is no more damning commentary on training than the common trainee statement that, "The trainer knows his area, but can't teach. Throughout the sessions I didn't hear anything but war stories."

The successful part-time trainer can overcome inexperience if he or she pays attention to some important guidelines.

Know the Expectations of the Training Manager

For most training programs, one person is assigned to make all necessary arrangements with the part-time trainer. That person may be a training director, an officer detailed as training coordinator, or a trainer who is delegated coordinating responsibilities. To become part of the training program team, the part-time trainer should work with and understand the coordinator. The coordinator will be able to solve problems and assist trainers, but he or she must first pull together the needs and strengths of all trainers. The part-time trainer must first contract with the training manager or coordinator to determine the goals, needs, and expectations of the training program.

Know the Logistics

A training program is a multifaceted operation. Early in the process the part-time trainer should become aware of what arrangements need to be made; what materials are to be developed; how the training environment is set up; and who will develop materials, provide audiovisual, typing, clerical, and other support.

Know the Participants

Training programs are developed for the purpose of changing the work knowledge, skills, and abilities of workers. A program cannot be properly prepared without knowledge about the people who are going to receive the training. The part-time trainer should find out from the appropriate support people some pertinent information: trainees' experience, work level, training needs, and relationship with the training program goals. The trainer's performance objectives are based on integrating training goals with trainees' needs.

Prepare Early and Thoroughly

A training segment is developed long before training is conducted. Unprepared instructors send a message to trainees **that** the training experience is not really that important. No trainer can enter a classroom and successfully "wing it." The part-time trainer has the responsibility to become acquainted with the training goals, get to know the participants, prepare logistically, prepare a thorough lesson plan, and creatively prepare presentation strategies.

Review Preparation with the Training Manager

The training manager's review of the trainer's plans is an important step in the proper coordination of any program. It presents opportunities. First, the manager and trainer are able to match how they view the training goals and other expectations previously discussed, and, second, the part-time trainer has the opportunity to receive valuable feedback from an experienced trainer. The part-time trainer should seek feedback on the appropriateness of his or her efforts at developing performance objectives, lesson plan content, presentation strategies, and evaluation ideas.

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Choose a Variety of Effective Presentation Strategies

How training is delivered is often the critical part of achieving trainee change. Thus, the presentation style is key. The part-time trainer should be comfortable with his or her own style. There are many different methods of presenting training that should be explored. Lecturing, relating experiences, and giving examples are common methods employed by the part-time trainer. These are important styles, especially when the trainer is a competent lecturer or if the trainees have little work experience. Rut there are many other methods which, if tried, will have a positive impact on trainees as well as add to the professional growth of the trainer. The part-time trainer should view his or her role as that of a person who fosters learning by helping trainees to discover new skills and information through a variety of methods.

Present with Enthusiasm

The most important attribute of anyone involved in a role of changing behavior, managing, or training is to be enthusiastic about the topic at hand. Being enthusiastic is contagious, while not being enthusiastic sends negative messages. If the part-time trainer takes the time to plan and prepare for an important training subject, he or she should follow through by conveying the importance and interest of the subject to the. trainees.

Look for Feedback

The trainer can rely on two valuable information sources for feedback on content and teaching effectiveness. First, the students have current and relevant feedback to give to the instructor. The trainer should seek out those opinions often during and after the program and through a variety of methods. Second, the training manager should have gained important information for the trainer through monitoring. Again, use the training manager's experience to review the value of completed training. The part-time trainer should view feedback and evaluations as opportunities for building on the training segment in a positive way and for improving his or her preparation and delivery methods. Feedback, in particular, provides a vehicle for upgrading the training program and improving the trainer's professional capacity.

CONTRACTING WITH THE TRAINING MANAGER

Contracting between the trainer and the training manager is the critical starting point for the part-time trainer. The part-time trainer usually does not know about the internal operations of the training unit. The trainer and manager need to establish a positive working relationship. As a result, contracting sessions offer opportunities for both parties to establish their needs and expectations.

The contracting stage is both a process and a tool for the people involved. The trainer and manager use it as a process for developing a working relationship with one another. During this process, the manager discusses his or her expectations, training goals, and personal views while the trainer discusses his or her skills, services, and personal and professional goals or needs. The process results in an exploration of:

- What the manager and part-time trainer want from each other.

- Whether they have the ability and resources to provide what is wanted in the relationship.

- Whether they are willing to enter into the relationship.

The manager and trainer also use the contracting process as a tool. The contract becomes a method of negotiating:

- Mutual establishment of program goals and objectives.

- Mutual decisionmaking on instructional strategies.

- Agreement on evaluation procedures.

- Agreement on when to return to the contracting process, where to establish review and decision points necessary for monitoring project development, and how to thoroughly evaluate the training results.

The contracting process has the advantage of allowing both the manager and the trainer

to examine and clarify their personal agendas and needs as early as possible. It allows them to develop a working relationship and to establish those responsibilities that are necessary to a successful work effort.

The disadvantage of trying to contract early in the arrangement is that the trainer may not be familiar with the ramifications of some responsibilities. For this reason, it is important that the trainer ask for a review of the contract periodically and be as knowledgeable as possible about the training requirements.

Important points to be discussed during the contracting process are:

- Training agency values.

- Training program goals.

- Expectations of the trainer's personal and professional behavior.

- Structure of the training agency as well as procedures for obtaining support and assistance.

- Limitations and abilities of the support staff, the support equipment, and the support budget.

- Manager's expectations of the training program's process and results.

- Trainer's personal needs and professional goals.

- Trainer's time constraints.

- Trainer's payment expectations.

- Evaluation and feedback process and mechanisms.

- Future programs and future trainer responsibilities.

The trainer should ensure that a process takes place that results in agreement on the major problems to be solved. The trainer has a responsibility to arrange time to meet with the training coordinator or manager and a duty to commit him or herself to the agreements made.

The part-time trainer has an additional responsibility to ensure that his or her effort fits into the overall training program and meshes well with the training department's working process.

LOGISTICS PREPARATION

Part-time trainers face different problems than their full-time counterparts. For example, they need to prepare logistically without advance knowledge of how the training support staff operates. Before training is started, therefore, certain logistical problems should be solved.

Training Environment

- Room arrangement. How may the seating and meeting situation be altered?

- Participant lists. Who are the trainees? What are their experiences and training needs?

- Lesson plan format. What does the agency require for lesson plan design and content?

- Audiovisual equipment. What equipment is available, and who is responsible for locating and setting it up?

- Movies, filmstrips, and slides. What audiovisual materials are available, and what is the process for obtaining them?

- Flip chart stands, paper, and markers. Does the agency provide flip charts and materials?

- Classroom aides and assistance. Will someone be available during the training to help out, especially in emergencies?

- Materials and handouts. Is a library of content materials available to trainers? How are they obtained?

- Breaks, lunch time policies. Are there standard policies and procedures concerning the length and number of breaks for trainees?

- Smoking policy. Is there a policy on smoking?

- Absentee policy. Is there a training department policy if trainees do not attend, or attend the training sporadically?

- Trainers' dress code.

- Trainers' parking area.

- Available telephones or message center. Where or how may trainers call their offices, and how are messages received by trainers?

- Janitor or maintenance assistance. If a maintenance person is needed during the training, how may the person be contacted?

Support Staff

- Secretaries' names, phone numbers, addresses, and responsibilities. How and who should be contacted for regular departmental clerical support?

- Typing, copying available for the part-time trainer. How does the trainer have materials typed and copies made?

- Procedures for obtaining materials, audiovisuals, etc. The trainer needs to know how to obtain support materials without violating departmental procedures.

- Sample training materials and handouts. While the part-time trainer may be developing training support materials and handouts, the training department will often have a specific format that should be followed. These materials may need to be included in a program notebook or follow a specific format to conform with other handouts. The trainer's materials should conform to sample formats.

- Classroom support. Who will assist the trainer in the classroom with materials or audiovisual equipment? If no one is assigned, will someone be available for emergency help?

Course Development

- Training goals, agenda. What is the overall program goal and the program agenda?

- Format for writing performance objectives. What is the department procedure for developing performance objectives?

- Lesson plans. What are the philosophy, content requirements, and format for developing lesson plans for the training segment?

- Test construction. How should pre-test and post-test questions be established and formatted? Are a pre-test and a post-test required?

  Evaluation and feedback. Does the training department follow a standard evaluation process? Can the trainer include his or her own feedback process? Will the trainer or others be responsible for conducting the evaluation process?

- Follow-up meetings. Is a follow-up meeting scheduled for the trainer and the training manager?

There are numerous logistical problems and situations to resolve before the training starts. The part-time trainer often finds that, because of time constraints, handling logistics is one of the most difficult training requirements. Logistics do require special attention if a program's success is to be ensured.

PRESENTATION PREPARATION

The process of developing and carrying out a training assignment includes:

- Determining the trainees' needs.

- Setting instructional performance objectives.

- Selecting a presentation strategy. This includes choosing a method and style.

- Developing support materials and handouts.

- Comparing training results to performance objectives.

The part-time trainer's key roles are to carry out the training program goal and serve the trainees' work-related needs. The presentation can be developed from a lesson plan format that forces the trainer to set objectives, choose a strategy, develop materials, and evaluate results.

Setting Performance Objectives

A trainer begins a lesson plan by writing performance objectives. The performance objectives determine the:

- Purpose of the training segment.

- Strategy for delivery.

- Course content.

- Evaluation process and content.

To write performance objectives, the trainer must:[2]

1. Identify the <u>behavior</u> or <u>performance</u> by name; specify the kind of behavior that will be accepted as evidence that the learner has achieved the objective.

2. Describe the important <u>conditions</u> under which the behavior will be expected to occur.

3. Specify the <u>criteria of acceptable performance</u> by describing how well the learner must perform.

When writing objectives:

- Be brief and to the point; include only one major item in each objective.

- Use an action verb to describe anticipated results.

- Specify a timeframe or target date for completion.

- Specify limits in the use of resources (manuals, people, equipment, etc.)

- Make objectives realistic in terms of previous performance, total responsibilities, and current resources.

- Inject enough challenge in an improvement or change objective to make it worth formulating.

- Choose objectives that are supportive and consistent with overall organizational missions.

- Choose areas for which the trainee has direct influence or control.

<u>Examples of Performance Objectives</u>. At the end of this training, each trainee will be able to:

1. Define the purpose of group discussions as a training technique.

2. Identify and describe the five steps in conducting effective group discussions.

3. Identify the six most commonly used group discussion techniques.

At the end of this session, each trainee will be able to:

1. Define and demonstrate large group, small group, and "buzz" group training techniques.

2. Define the purpose of the brainstorming technique and demonstrate it.

3. Identify the four general rules for effective use of the brainstorming technique.

4. Define and demonstrate the training techniques of critical incident and case study.

5. Define and demonstrate the "role play" as a training technique.

6. Identify five of the seven steps to make effective use of the role play.

The above models should clearly state:

1. What the student will do to demonstrate what he or she has learned.

2. The conditions under which the desired performance is to be demonstrated.

3. Performance standards.

Lesson Plan Format and Development

There are many purposes for developing lesson plans. Most often lesson plans are used by the training coordinator to ensure consistency among trainers. However, they are also useful as quality control instruments, as an evaluation baseline, as tools for creating a collective body of knowledge for other trainers and staff, and as devices to promote accountability for the total training department effort.

The lesson plan format should include:

- Subject title.

- Topic title.

- Target population.

- Time allocation.

- Classroom requirements.

- Performance objectives.

- Evaluation procedures.

- Special methods.

- Training aids, supplies, and equipment.

- Pre-test and post-test.

- Instructional content and presentation guide.

- Notes to the trainer.

Once the performance objectives are established, the next important step is to develop a presentation guide. The process of developing the presentation guide and instructional content will provide answers to questions you may have in other areas. The presentation guide should include several major sections.

<u>Introduction</u>. During this stage the trainer should prepare the participants by motivating them, creating an incentive for them to learn, and explaining the importance of the lesson. This is when the performance objectives should be identified and explained. Performance objectives are:

- Trainee motivation.

- Statement of clear, measurable goals.

- Outline of content.

<u>Presentation</u>. This stage gives the trainer the opportunity to present all theory, information, and facts that are to be covered. It is essential that all information related to the performance objectives be communicated during this stage. Presentation includes:

- Subject matter.

- Clear organization.

- Use of training aids.

<u>Application</u>. In order for the participants to grasp the material presented as well as provide feedback to the trainer, the application stage involves the trainees with applying the information. Application consists of:

- Appropriate strategies.

- Use of training aids.

- Experiential learning.

<u>Summary</u>. When the trainer believes that sufficient time has been devoted to the application stage, all major presentation points should be summarized. This stage should include a review and brief discussion of all the performance objectives. The summary contains:

- A summary of content.

- A review of objectives.

<u>Evaluation</u>. At the conclusion of the summary, an evaluation procedure should occur. A written examination that measures what participants gained from training is administered. The exam should be based on performance objectives. An evaluation consists of:

- Administration of the post-test.

- Critique of training presentation.

A blank sample cover sheet and model lesson plan are shown in Figures 1 and 2, respectively. Figures 3 and 4 provide samples of a completed cover sheet and lesson plan to give the new part-time trainer a good example of how to develop a curriculum and presentation style.

PRESENTATION STYLES

The part-time trainer is usually faced with a dilemma when selecting a teaching strategy. First, the trainer/practitioner seldom has extensive training experience that enables developing different styles to match the various trainees' learning needs. Second, the trainer/practitioner is usually faced with experienced adult learners who require active experiential teaching strategies.

It makes good sense for the part-time trainer to use the strengths he or she possesses. However, the trainer should also be prepared to experiment with different styles to best meet the trainees' needs. Described below are some teaching methods that the part-time trainer may find helpful.

Lecture

The lecture is an efficient and quick method of delivering a large amount of information to larger groups of trainees. Although lecturing is often the most comfortable strategy for new trainers, it is usually ineffective, potentially boring, and lacks audience participation.

Demonstration or Behavior Modeling

This method employs showing by doing. The advantage of demonstrating correct behavior is that the trainee is offered only the appropriate method of performing. In his book Behavior Modeling, Zemke describes three important elements of this technique:[4]

Attention: Make sure trainees are attentive to the important behavior being modeled.

Retention: Help the trainees remember the important behavior.

Reinforcement: Use proactive sessions to develop trainee skills.

Group Discussions

The purpose of a discussion strategy is to achieve complete class participation, allowing all trainees an equal opportunity to express their ideas and opinions. This can best be accomplished by following certain guides.

- Act as a facilitator, not an information giver.

- Promote full class participation.

- Encourage opinions.

- Use questions to keep discussion flowing.

- Keep discussion positive.

- Present occasional summaries.

- Listen carefully, showing interest.

- Maintain control.

- Don't take sides.

- Don't embarrass participants.

- Summarize the discussion.

Problem Solving

There are four principal problem-solving methods: case study, critical incidents, brainstorming, and informal role playing. These methods are extremely effective for teaching adults since trainees participate directly in discovering the solutions to relevant work-related situations.

Case study. This method entails presenting a hypothetical problem scenario of a realistic situation. The class solves the problem through participation in small discussion groups. Cases must be prepared in advance and they must be directly relevant to the trainees' "back home" situation.

Critical incident.[5] In this learning situation, the trainees design realistic situations and then move on to solve the problems in individual and small group problem-solving units. It is important that the critical incidents be germaine to the work situation and that all trainees

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participate in the problem-solving experience. To assure that trainees focus on the issues that confound the potential solutions, the trainer should act as a facilitator for the small groups.

Brainstorming. Brainstorming is quickly generating ideas to solve a particular problem. The rules of brainstorming are:

- All participants state their ideas quickly.

- Ideas or opinions are not evaluated.

- The trainer strives to create a "free-wheeling" atmosphere.

- Emphasis is on quantity of ideas.

- The trainer records the ideas on flip chart paper so all can see and piggyback their ideas into other statements.

Brainstorming generates good discussions. However, the trainer should follow through by condensing and summarizing input into a **solution** statement to solve the problem.

Informal role playing. In this method, the trainer performs a spontaneous action to set in motion a search for an answer to a specific problem. The role play helps students and trainer to solve the problem.[6] This method differs from prepared role play, which is usually a demonstration or behavior modeling strategy. Informal role playing allows:

- The trainer to receive immediate feedback on students' understanding of the material.

- The students to create realistic situations to solve.

- The students to try out newly acquired learning.

These are only a few examples of presentation styles. However, the training strategies presented are proven methods of instigating adult learning. The part-time trainer should remember that experienced workers and adult students require relevant, work-related, active experiential training.

EVALUATION METHODS

A training session lacking in managerial review leaves the trainer no wiser than when he or she started. Some reasons, then, for evaluating training programs that are especially relevant to the part-time trainer are described below. Evaluation is helpful in order to:

- Determine how well the training is meeting its stated objectives.

- Identify unintended outcomes.

- Identify program strengths and weaknesses so that the training quality can be improved.

The part-time trainer will derive the most benefit from two particular types of evaluation.

- The first form of evaluation is conducted while the training program is in progress so that the trainer can make changes or modifications along the way. Some of the features of this evaluation form are that:

  -- Questionnaires can be administered at any time to encourage direct feedback. (See the sample in Figure 5.1

  -- Informal feedback is usually provided by students.

  -- Student representatives can be selected for meetings with the instructor periodically throughout the training session.

  -- Instructor interviews can be conducted during breaks or class time.

  -- Observing how well trainees perform during role playing or skill development gives the instructor cues as to his or her effectiveness.

- A second form of evaluation is conducted before and after the training program to measure how well the training objectives have been achieved. Part-time trainers arc often asked to develop standardized pre-test

and post-test questions that directly relate to performance objectives and training content.

Test formats include:

-- Multiple choice.

-- True/false.

-- Matching.

-- Essay.

-- Completion/fill in blanks.

Multiple-choice questions are the most popular method of testing since they are easy to design, score, and relate to objectives, and they provide alternative choices for the trainee.

Test formats should be designed to:

-- Measure objectives accurately and consistently.

-- Be easy to administer, take, and score.

-- Discriminate differences among trainees.

-- Include at least one test item on each key point.

-- Include a range of easy, average, and difficult items.

-- Be objective and not affected by the opinions of the scorer.

-- Predict the trainee's success on the job.

Several sample evaluation instruments are shown in the pages that follow. Figure 5, as previously mentioned, is an example of a feedback instrument. Figure 6 is a sample multiple-choice test.

SUMMARY

Figure 7 provides a checklist to assist the part-time trainer in successfully preparing for and conducting a training program. The checklist is a step-by-step guide that encompasses the issues discussed in this document.

Figure 1. SAMPLE BLANK COVER SHEET

COURSE TITLE _____

LESSON TITLE _____

INSTRUCTOR(S) _____

Performance Objectives:	Evaluation Procedures: (How will each objective be evaluated?)
1.	1.
2.	2.
3.	3.

Time Frame: Number of Participants:

 Total: _____ hrs. _____ min.   Space Requirements:

 Suggested Schedule:

 From: To:

Methods:

Figure 1.   SAMPLE BLANK COVER SHEET (continued)

Equipment and Supplies Needed:

_____ Flip chart   Number needed _____   _____ Videotape player
_____ Chalk board   Type: l/2" open reel _____
_____ 16 mm. projector   3/4" cassette _____
      Film length _____ min.   Betamax _____
_____ Slide projector   _____ Videotape length   min.
      Type: Carousel   _____   _____ Videotape recorder with
             Tray   _____   camera
             Sound-on-slide _____   _____ Public address system
                                               _____ Overhead projector

---

Student Materials (Handouts):

    Title*   # Needed   When Distributed   Comments

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Instructor Materials: Pre-Lesson Preparation:

Figure 2.   SAMPLE BLANK LESSON PLAN

Lesson _____   Page 1

PRESENTATION GUIDE	NOTES TO TRAINER

Should include:
 	
  A.   Introduction
 	
  B.   Presentation
 	
  C.   Application
 	
  D.   Summary
 	
  E. Evaluation	

Figure 2. SAMPLE BLANK LESSON PLAN (continued)

Lesson _____ Page _____

PRESENTATION GUIDE	NOTES TO TRAINER

Figure 3. SAMPLE NATIONAL ACADEMY OF CORRECTIONS COVER SHEET

Course Title _____

Lesson Title Stress in the Correctional Environment _____

Instructor(s) _____

_____

Prepared by _____ Date _____

Time Frame:

 Total: __4__ hrs. __0__ min.

 Suggested Schedule: Monday

 From: 1:00 p.m. To: 5:00 p.m.

Target Population:
 Correctional Managers
Number of Participants: 30
Space Requirements:
 1 room with tables, chairs, or
 desks to accommodate trainees. Room
 should be located in relatively
 quiet area. Eliminate possibility
 of interruptions to best of
 ability (e.g., telephones).

Performance Objectives:
Upon completing this lesson and its
related activities, the learner, from
memory, should be able to:

1. Define stress in at least 2
    different ways.
2. List at least 5 physical or
    psychological reactions to
    stress.
3. Define the difference between
    distress (negative stress) and
    eustress (positive stress).
4. Explain the meaning of the terms:
    stressors, context, and coping as
    well as their relationship to
    stress management.
5. List at least 6 out of 10 ap-
    proaches that can be used to help
    a person cope with stress.
6. Describe at least 2 ways to
    relax.

Evaluation Procedures:
 How will objectives be evaluated?)

Written test on completion of topic
presentation. A score of 65% is
passing for the 5-question test.
Each question is worth 20%.

Figure 3.   SAMPLE NATIONAL ACADEMY OF CORRECTIONS COVER SHEET (continued)

Methods: Lecture.

Equipment and Supplies Needed:
 X   Flip chart   Number needed 2   **X**   Videotape player
        Chalk board   Type :   1/2" Open reel _____
        16 mm. projector   3/4" cassette X
        Film length: _____ min.   Betamax
        Slide projector   Videotape length   ___ min.
        Type: Carousel   _____   Videotape recorder with
               Tray   _____   camera
               Sound-on-Slide _____   Public address system
                                                 X   Overhead projector

  X   Felt-tipped marker
  X   Masking tape
Other _____

Student Materials (Handouts):

     Title   # Needed   When Distributed   Comments

 "Stress"* (Booklet
 published by Blue
 Cross Assoc.,
 Chicago, IL 1974)

*Copyright permission

Instructor Materials:	References:
Videotape: "Burnout"	Behavior Modification Training Program
Sufficient number of self-assessment	in Self-Control: Workbook, New Jersey
forms, student worksheets, (cont)	Neuro-Psychiatric Institute, (cont)

Figure 3. SAMPLE NATIONAL ACADEMY OF CORRECTIONS COVER SHEET (continued)

CONTINUATION   PAGE

Instructor materials, continued

Trainee tests
Overhead transparencies #1 and #2
One pencil and one 5 x 8 card for each participant

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Figure 4.   SAMPLE NATIONAL ACADEMY OF CORRECTIONS LESSON PLAN

Lesson_____Stress in the Correctional Environment_____Page ____1____

PRESENTATION GUIDE	NOTES TO TRAINER

Today's lesson is on stress and stress management. The objectives are:
 	
I.   Introduction
 	
    A.   Definitions of Stress
 	
       There are several ways of defining stress. Every person probably has his or her own personal definition.
 	
       1.   Define stress in your own words and write it down on the 5 x 8 card.
	Write objectives on flip chart.
	
	Write all definitions on flip chart. Save pages with definitions and tape these to wall. Put Selye's and Brodsky's definitions on flip chart. NOTE: To better understand the differences and similarities between Selye's and Brodsky's definitions of stress, you should read pages 41-43 in the Training Reference Manual.

II. Presentation
 	
    A. 1.   Hans Selye's definition: Stress is the nonspecific response of the body to any demand made upon it.
 	
       2.   Carroll Brodsky's definition: The awareness of awareness, the recognition that one is not functioning automatically, together with the suspense and anxiety that accompany this state.
	
	Discuss differences and similarities between Selye's and Brodsky's definitions versus those of the participants.

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PRESENTATION GUIDE	NOTES TO TRAINER
3. Stress is not the same as a stressor. A stressor is a cause of stress reaction. A stressor is any physical or non-physical (expected) event that can cause stressful feelings or reactions. List possible stressors on the job or at home on your 5 X 8 card.	Write a sampling of the participants' stressors on flip chart. Put under two columns headed "On the Job" and "At Home."
B. Reactions to Stress There are physical and social-psychological reactions to stress. They are:	Show videotape: "Burnout" <u>before</u> you discuss the reactions to stress.
1. High blood pressure (hypertension). 2. Kidney disease. 3. Peptic ulcer. 4. Endocrine-gland disorders. 5. Heart conditions. 6. Destructive off-work habits (use of drugs, alcohol dependency, etc.). 7. Sour attitude. 8. Excessive sick time. 9. More than usual impatience. 10. Feeling of being alone.	Make sure everyone can see the monitor.
C. The Stress Mechanism Stressors, whether actual physical events or expectations of stressful events, cause specific effects on our bodies. 1. Messages from brain and central nervous system through the hypothalamus stimulate the autonomic nervous system and pituitary gland. 2. Pituitary gland secretes adrenocortico-trophic hormone (ACTH) into blood. 3. ACTH stimulates adrenal glands to secrete adrenalin. 4. Adrenalin and the sympathetic nerves in the now stimulated autonomic nervous system stimulate the heart, muscles, and lungs, and raise blood pressure. At the same time, blood flow is improved and oxygen consumption and strength are increased.	Mention to the class why it is important to understand the physical effects of stress. It is important because this physical reaction occurs normally and naturally in all of us whenever we are in a stressful situation. Understanding this is helpful in explaining the symptoms of stress. NOTE: Do not spend a great deal of time discussing this material. Present it and move on to Section D. Overhead Transparency #1

Figure 4. **SAMPLE NATIONAL ACADEMY OF CORRECTIONS LESSON PLAN (continued)**

Lesson_____Stress in the Correctional Environment_____Page____3____

PRESENTATION GUIDE	NOTES TO TRAINER
5. Liver, spleen, stomach, and other organs are similarly stimulated. 6. When situation causing stress is removed or resolved, body functions are slowed to "normal" by parasympathetic nerves in autonomic nervous system. 7. Innate responses include: a. fight or flight response-- emergency reaction activated by sympathetic nerves. b. relaxation response--reduction of stimulated condition activated by parasympathetic nerves. It is possible to activate the response through psychological means (i.e., meditation). D. Distress versus Eustress We need some level of stress in our lives in order to feel challenged and motivated. However, too much stress can be harmful. 1. Distress (negative)--harmful stress that causes us to constantly readjust or adapt. 2. Eustress (positive)--essential to good health; keeps us challenged and alive. 3. Two main types of people. Neither is better than the other. a. racehorses: who thrive on stress and are happy with fast-paced life-style. b. turtles: who require peace, quiet, and tranquility. 4. What may cause stress for one person may not for someone else. It depends on the person's frame of reference and attitude.	 Write definitions on flip chart. Give examples. Give some work examples: excessive paperwork can be stressful to some but may not be to others; working daily with hostile inmates may be stressful to some while

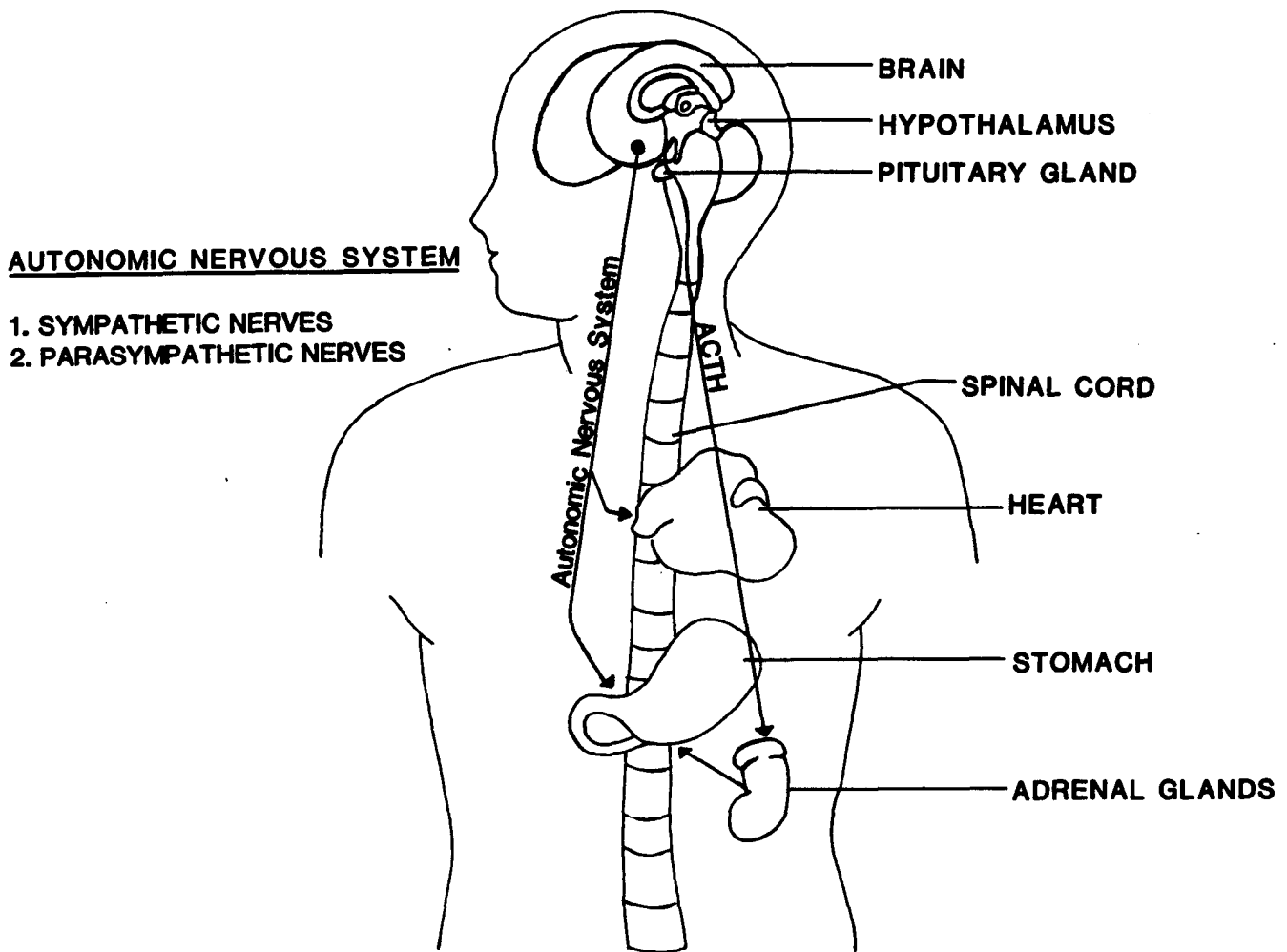| PRESENTATION GUIDE	NOTES TO TRAINER
	others enjoy that kind of work. Ask the participants for other work examples.
5. Our attitude determines if we perceive an experience as pleasant or unpleasant. 6. Adopting new attitudes towards job, home, and life situations can make it possible to change negative stress into positive stress.	
E. Self-Assessment Exercise (work setting) Provides you with an opportunity to discover areas of strengths and weaknesses in coping with work stress.	On flip chart write the definitions of stressors, context, and coping.
1. Stressors-- any physical or nonphysical (expected) event that can cause stress-ful feelings or reactions. 2. Context-- environment in which stress occurs. 3. Coping-- ability to deal adequately with stressful feelings or reactions.	

Have trainees complete self-assessment exercise individually. Discuss it as a class.	Follow instructions on self-assessment exer-cise, completing one part at a time in this order:
	Part 1: stressors
	        checklist
	Part 2: context survey
	Part 3: coping checklist
	Part 4: diagram
	        completion

F. Coping with Stress There are recognized approaches to facili-tate coping with stress more positively.	Overhead Transparency #2 NOTE: Give as many examples as possible and take your time during this section; it's important.
1. Work off stress--physical activity allows you a "fight" outlet for mental stress. 2. Talk out your worries--it helps to share worries with someone you trust and respect.	

Figure 4. **SAMPLE NATIONAL ACADEMY OF CORRECTIONS LESSON PLAN (continued)**

Lesson___Stress in the Correctional Environment___ Page___5___

PRESENTATION GUIDE	NOTES TO TRAINER
3. Learn to accept what you cannot change-- it beats spinning your wheels and get- ting nowhere.	
4. Avoid self-medications--they mask the symptoms, but they do not help you ad- just to the stress itself.	
5. Get enough sleep and rest--lack of sleep can lessen your ability to deal with stress.	
6. Balance work and recreation--recreation can relax your mind.	
7. Do something for others--get your mind off yourself.	
8. Take one thing at a time--set some tasks aside and work on the most urgent.	
9. Give in once in awhile--try giving in instead of fighting and insisting you are always right.	
10. Make yourself available--when you are bored and feel left out, go where the action is.	
III. <u>Application</u>	
A. <u>Relaxation Exercises</u>	
1. Breathing exercise	Demonstrate.
Have trainees experience the breathing exercise. Emphasize the importance of practice.	Follow breathing exer- cise script. pp. 88-94, <u>Stress</u>, Blue Cross Association pamphlet.
2. Muscle-relaxant method	
Have trainees experience the muscle- relaxant method. Emphasize the importance of practice.	Follow muscle-relaxant exercise script, pp. 30- 34, the <u>Trainers Refer- ence Manual</u>.

PRESENTATION GUIDE	NOTES TO TRAINER

IV. <u>Summary</u>
 	
   A.   <u>In Review of Our Lesson, These Points Were Covered</u>:
 	
      1.   Definitions of stress.
 	
         a.   participants'
         b.   Selye's
         c.   Brodsky's.
 	
      2.   Recognizable physical and psychological reactions to stress.
      3.   Biological stress mechanisms.
 	
         a.   fight or flight response.
         b.   relaxation response.
 	
      4.   Distress versus eustress.
      5.   Self-assessment exercise.
      6.   Specific approaches to facilitate coping with stress.
      7.   Relaxation exercises.
      8.   The reason these points were made was:
 	
         a.   to define the program.
         b.   to discover personal areas of focus.
         c.   to offer coping mechanisms useful on the job or off.
 	
 V.   <u>Evaluation</u>
 	
   A.   <u>Administer written test</u> (based on instructional objectives).
 	
   B.   <u>Hand out a copy of "Stress"</u> by the Blue Cross Association to each trainee.
	Put major points on flip chart.

THE STRESS MECHANISM

AUTONOMIC NERVOUS SYSTEM

1. SYMPATHETIC NERVES
2. PARASYMPATHETIC NERVES

BRAIN
HYPOTHALAMUS
PITUITARY GLAND
SPINAL CORD
HEART
STOMACH
ADRENAL GLANDS

COPING WITH STRESS

1. WORK OFF STRESS

2. TALK OUT YOUR WORRIES

3. LEARN TO ACCEPT WHAT YOU CANNOT CHANGE

4. AVOID SELF-MEDICATION

5. GET ENOUGH SLEEP AND REST

6. BALANCE WORK AND RECREATION

7. DO SOMETHING FOR OTHERS

8. TAKE ONE THING AT A TIME

9. GIVE IN ONCE IN AWHILE

10. MAKE YOURSELF AVAILABLE

Figure 4. SAMPLE NATIONAL ACADEMY OF CORRECTIONS LESSON PLAN (continued)

ANSWER KEY

STRESS IN THE CORRECTIONAL ENVIRONMENT
WRITTEN TEST

Score____

NAME/TITLE   DATE

1. Give two definitions of stress:

    1. Selye: the nonspecific response of the body to any demand put upon it.

    2. Brodsky: the awareness of awareness, the recognition that one is not
        functioning automatically, together with the suspense and anxiety that
        accompany this state.

2. List at least 5 physical and/or psychological reactions to stress:

    1. High blood pressure (hypertension)

    2. Kidney disease

    3. Peptic ulcer

    4. Endocrine - gland disorders

    5. Heart conditions

    6. Destructive off-work habits (drugs, alcohol, etc.)

    7. Excessive sick time

    8. Sour attitude

    9. More than usual impatience

    10. Feeling of being alone

3. Define the terms distress and eustress:

    1. Distress (negative) - harmful stress that causes us to constantly
        readjust or adapt.

    2. Eustress (positive) - essential to good health; keeps us challenged
        and alive.

4. Explain what is meant by the terms: stressor, context, and coping:

    1. Stressor - any physical or non-physical (expected) event that can
        cause stressful feelings or reactions.

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Figure 4. **SAMPLE NATIONAL ACADEMY OF CORRECTIONS LESSON PLAN (continued)**

2. Context - environment in which stress occurs.

3. Coping - ability to deal adequately with stressful feelings or reactions.

5. List at least 6 approaches that can be used to facilitate positive coping with stress:

   1. Work off stress

   2. Talk out your worries

   3. Learn to accept what you cannot change

   4. Avoid self-medication

   5. Get enough sleep and rest

   6. Balance work and recreation

   7. Do something for others

   8. Take one thing at a time

   9. Give in once in awhile

   10. Make yourself available

Figure 5. SAMPLE FEEDBACK INSTRUMENT

TOPIC _____   INSTRUCTOR _____

DATE _____

KEY: 4 - Excellent
      3 - Good
      2 - Fair
      1 - Poor
      0 - Not Evident

I.   INTRODUCTION

   A. Motivational   4 3 2 1 0
   B. Statement of Clear, Measurable Goals   4 3 2 1 0
   C. Content Outline   4 3 2 1 0

II. CONTENT PRESENTATION

   A. Knowledge of Subject Matter   4 3 2 1 0
   B. Clear Organization   4 3 2 1 0
   C. Appropriate Presentation Style   4 3 2 1 0
   D. Use of Training Aids   4 3 2 1 0
   E. Audience Involvement   4 3 2 1 0
   F. Eye Contact   4 3 2 1 0
   G. Voice Volume, Speed   4 3 2 1 0
   H. Nonverbal Movements   4 3 2 1 0
   I. Sincerity   4 3 2 1 0

III. APPLICATION

   A. Skills and Behavior Were Developed   4 3 2 1 0
   B. Content Was Relevant to Work Needs   4 3 2 1 0

IV. SUMMARY

   A. Objectives Reviewed   4 3 2 1 0
   B. Content Summarized   4 3 2 1 0

STRENGTHS OF THE TRAINING:

SUGGESTED IMPROVEMENTS:

27

Figure 6.   SAMPLE MULTIPLE-CHOICE TEST

Mental Retardation - Pre-Test

Preliminary Questionnaire Distributed Before Exposition of Lesson Plan:

1. What percentage of the population is retarded?

    a. 3%   b. 5.4%   c. 8%   d. 10%   **e.** 12%

2. The percentage of the retarded people living in institutions is
    approximately:

    a. 3%   b. 7.5%   c. 10%   d. 15%   e. 25%

3. Retarded people

    a. aren't very sensitive about their human dignity
    b. have the same needs you have
    c. don't need as much self-fulfillment
    d. have a lessened need for love and loving
    e. aren't very aware of a feeling of self-worth

4. Authorities in the field of retardation approve most of a living situation
    where the retarded citizens live in

    a. rural areas
    b. villages designed for them
    c. institutions
    d. average sized residences in normal neighborhoods, rural or urban
    e. dormitories attached to workshops, for the period of training

5. Select the best of the following. Most retarded adults:

    a. can work on simple repetitive jobs
    b. cannot work
        can work in sheltered environments
    c. can be kept busy in activity centers
    e. can work on competitive jobs in the community

6. The trend is to have retarded citizens be

    a. more segregated from society
    b. given more separated services
    c. included in the full stream of society
    d. separated from society except for transportation
    e. separated from society only in employment

Figure 6.   SAMPLE MULTIPLE-CHOICE TEST (continued)

7. If you're going to be retarded, you're

    a. born retarded
    b. retarded by early childhood
    c. a candidate for retardation at any age
    d. likely to degenerate gradually
    e. retarded before puberty

*Questionnaire courtesy of D. Norley, President, Committee on Mental
 Retardation, Deland, Florida

TRAINER'S NOTE:

    Answers
    1 - a
    2 - a
    3 - b
    4 - d
    5 - e
    6 - c
    7 - c

Figure 7.   PART-TIME TRAINER PROGRAM DEVELOPMENT CHECKLIST

TASKS	YES	NO	PARTIALLY	NOT SURE	ACTION
1. I have been contacted by a training department to conduct a training segment.					
2. A contracting meeting has been arranged with the training manager/coordinator.					
3. To prepare for the meeting, I have researched a. My professional development needs. b. The training department's values. c. The training program's goals.					
4. The contracting meeting has been conducted and the following have been addressed: a. Training agency values. b. Training program goals. c. Expectations of trainer's personal and professional behavior. d. Structure of the training agency including procedures for obtaining support and assistance. e. Limitations and abilities of the support staff, the support equipment, and the support budget. f. The manager/coordinator's expectations of the training program process and results. g. My personal and professional goals. h. My time constraints. i. My payment amount and payment schedule. j. Evaluation and feedback process and methods.					

Figure 7.   PART-TIME TRAINER PROGRAM DEVELOPMENT CHECKLIST

TASKS	YES	NO	PARTIALLY	NOT SURE	ACTION
k. Future programs and future trainer responsibilities.					
5. Logistics preparation					
a. Training environment questions to be answered:					
1) Room arrangement.					
2) Participant lists.					
3) Lesson plan format.					
4) Audiovisual equipment.					
5) Audiovisual library review.					
6) Flip chart stands and paper.					
7) Classroom aides and assistance.					
8) Materials and handouts.					
9) Breaks, lunch time policies.					
10) Smoking policy.					
11) Absentee policy.					
12) Trainers' dress code.					
13) Trainers' parking area.					
14) Telephone or message center.					
15) Janitor or maintenance assistance during training.					
b. Support staff:					
1) Secretaries' names, phone numbers.					
2) Typing, clerical assistance.					
3) Procedures for obtaining materials.					
4) Models for training material development.					
5) Classroom support.					
c. Course development:					
1) Training goals and agenda.					

Figure 7. PART-TIME TRAINER PROGRAM DEVELOPMENT CHECKLIST

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
2) Performance objectives format.					
3) Lesson plan format.					
4) Test construction format.					
5) Evaluation and feed-back procedures.					
6) Follow-up meeting arranged.					
6. Presentation preparation:					
a. <u>Performance objective</u>. Does the performance ob-jective state:					
1) What the student will do to demonstrate what he or she has learned?					
2) The conditions under which the desired per-formance will be demonstrated?					
3) The standards that performance must meet?					
b. <u>Lesson plan format</u>. Does the lesson plan include:					
1) Subject title?					
2) Topic title?					
3) Target population?					
4) Time allocation?					
5) Classroom requirements?					
6) Performance objectives?					
7) Evaluation procedures, pre-test and post-test?					
8) Training aids, supplies, and equip-ment?					
9) Instructional content and presentation guide?					
10) Notes to the trainer?					

Figure 7.   PART-TIME TRAINER PROGRAM DEVELOPMENT CHECKLIST

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
c. <u>Presentation guide</u>. Does the presentation guide include: 1) Introduction? 2) Presentation? 3) Application? 4) Summary? 5) Evaluation? d. <u>Presentation strategies and styles.</u> Does the presentation guide include: 1) Lecture? 2) Demonstration or behavior modeling? 3) Group discussion? 4) Problem-solving techniques?					
1. Evaluation and feedback a. Has a feedback strategy been designed that will monitor strengths and weaknesses of the training during the training? b. Has an evaluation instrument been developed that will determine the extent the training is meeting the stated objectives? c. Does the evaluation instrument: 1) Include pre-test? 2) Include post-test? 3) Measure accurately? 4) Work easily? (Is it easy to administer, take, and score?)					

Figure 7.   PART-TIME TRAINER PROGRAM DEVELOPMENT CHECKLIST

TASKS	YES	No	PARTIALLY	NOT SURE	ACTION
5) Include at least one test item on each key point?					
6) Include a range of easy, average, and difficult items?					
7) Achieve objectivity?					
8) Predict the trainee's success on the job?					
8. The training program has been completed.					
9. Follow-up					
a. A follow-up meeting with the training manager/ coordinator has been conducted.					
b. Future changes and respon-sibilities have been clarified or the training arrangement has been terminated.					

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4. Zemke, Ron, "Behavior Modeling: The 'Monkey See, Monkey Do' Principle," <u>Adult Learning in Your Classroom</u>, Lakewood Publications, Minneapolis, Minnesota, 1982, pp. 65-68.

5. Katsampes, Paul L., "Changing Correctional Officers: A Demonstration Study," <u>International Journal of Criminology and Penology,</u> Vol 3, (1975), pp. 123-144.

6. Broadwell, Martin M., "Effective Informal Role Playing," <u>Adult Learning in Your Classroom</u>, Lakewood Publications, Minneapolis, Minnesota, p. 92.

7. Evaluation methods were summarized from the <u>NIC Train the Trainers Training Manual</u> lesson plans.

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1. NATIONAL INSTITUTE OF CORRECTIONS INFORMATION CENTER, 1790 30th Street, Suite 130, Boulder, Colorado 80301, 303/444-1101.

2. NATIONAL INSTITUTE OF CORRECTIONS, NATIONAL ACADEMY OF CORRECTIONS, 1790 30th Street, Suite 430, Boulder, Colorado 80301, 303/497-6060.

3. AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, P.O. Box 5370, Madison, Wisconsin 53705.

4. AMERICAN ASSOCIATION OF CORRECTIONAL TRAINING PERSONNEL, P.O. Box 5406, Mississippi State, Mississippi 39762

5. CORRECTIONAL TRAINING AND EVALUATION CENTER, Virginia Commonwealth University, 816 W. Franklin Street, Richmond, Virginia 23284.

6. TRAINING WEST, 17 Washington Street, P.O. Box 4990, Norwalk, Connecticut 06856.

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