

Sample Forms

Training

- Sample training agenda for SHO volunteers
- Pros and cons of one long training session vs. many short sessions
- Timeline for producing a training event
- Tip Sheet for training development process
- Training design worksheet
- Training evaluation form

Trainer's Agenda
SHO Volunteer Training
July 11, 2002

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|-------|---|-------------------------|
| I. | Welcome
Grayce Rund | 10:00 a.m. – 10:05 a.m. |
| II. | Volunteer Agreement/Confidentiality Agreement
Grayce Rund | 10:10 a.m. – 10:20 a.m. |
| III. | Public Benefits Presentation
Yvonne Tobias, BSU Paralegal | 10:25 a.m. – 10:45 a.m. |
| | Break | 10:50 a.m. – 11:05 a.m. |
| IV. | Interview Techniques
Carol Matthews | 11:10 a.m. – 11:30 a.m. |
| V. | Consumer Law Presentation
James Sugarman, LCE Staff Attorney | 11:35 a.m. – 11:55 a.m. |
| | Lunch Break | 12:00 p.m. – 1:00 p.m. |
| VI. | Landlord-Tenant Presentations
Deniece Fields, LCE Staff Attorney | 1:05 p.m. – 1:25 p.m. |
| VII. | Website Review
Grayce Rund | 1:30 p.m. – 2:20 p.m. |
| | Break | 2:20 pm. – 2:35 p.m. |
| VIII. | Role Playing Session
[Practice Intake Sheet and eligibility guideline
review, interview skills, issue spotting, website
navigation to deliver services, if needed
– use common concerns and services as
bases for Scenarios] | 2:35 p.m. – 3:55 p.m. |
| | Questions and Answers | 4:00 p.m. – 4:15 p.m. |
| | Closing | 4:15 p.m. – 4:20 p.m. |

Trainer's Agenda [includes times]
SHO Volunteer Training
July 10, 2002

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|-------|--|-------------------------|
| I. | Welcome and Introductions – Grayce Rund | 10:00 a.m. – 10:15 a.m. |
| II. | Overview of Legal Counsel for the Elderly
Jan May, Managing Attorney LCE | 10:20 a.m. – 10:40 a.m. |
| III. | Overview of Volunteer Lawyers Project
Shirley Williams, Supervising Attorney VLP | 10:45 a.m. – 11:05 a.m. |
| IV. | Overview of LCE Legal Advice Line
Carol Matthews, LAL Attorney | 11:05 a.m. – 11:25 a.m. |
| | Break | 11:25 a.m. – 11:45 a.m. |
| V. | Overview of Intake Specialist Activities
Paul Davis, LCE Office Manager | 11:45 a.m. – 12:05 a.m. |
| | Lunch Break | 12:05 p.m. – 1:00 p.m. |
| VI. | Overview Self Help Office
Grayce Rund, Supervising Attorney SHO
Volunteer Job Description
SHO Services
SHO Intake Form
Eligibility Guidelines | 1:05 p.m. – 1:25 p.m. |
| VII. | SHO Procedures “Nutz & Boltz” | 1:25 p.m. – 1:55 p.m. |
| | Break | 2:00 p.m. – 2:15 p.m. |
| VIII. | Practical Application Session
Review of Practice Intake Sheets
Apply Guidelines to Evaluate Range of
Available Services to Resident | 2:20 p.m. – 4:00 p.m. |

APPENDIX #11

Pros and Cons of One Long Session vs. Many Short Sessions

ONE LONG SESSION	
Pros	Cons
<ul style="list-style-type: none"> ✓ Allows volunteers to focus in-depth on issue or issues. ✓ Enables more detailed coverage. ✓ Leads to greater comprehension of material. ✓ Encourage immersion in subject. ✓ Needs trainers who are highly knowledgeable about topic and skilled in maintaining interest over long periods of time. 	<ul style="list-style-type: none"> ➤ May lead volunteers to become bored or confused. ➤ May overload volunteers with too much material at one time.

MANY SHORT SESSIONS	
Pros	Cons
<ul style="list-style-type: none"> ✓ Allows volunteers to concentrate on a single issue. ✓ Promotes quick absorption of material and ideas. 	<ul style="list-style-type: none"> ➤ May seem to trivialize material. ➤ May cause vital issues to be overlooked because of time constraints.

<ul style="list-style-type: none">✓ Sets volunteers up to learn more at future trainings.✓ Gives novice volunteer trainers scope to learn how to lead trainings.✓ Allows for more interaction and more attention to individual concerns.	<ul style="list-style-type: none">➤ Need trainers skilled in presenting material in a limited amount of time.
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APPENDIX #12

Timeline for Producing a Training Event

TIME	ACTIVITY	RESOURCES
Month 1	<ul style="list-style-type: none"> <input type="checkbox"/> Assess needs and design Interviewing Skill Training. <input type="checkbox"/> Identify co-trainers and target audience. <input type="checkbox"/> Develop general agenda. 	<ul style="list-style-type: none"> ✓ Needs assessment survey for mail (or by phone) ✓ Staff to act as trainers or materials developers
Month 2	<ul style="list-style-type: none"> <input type="checkbox"/> Identify size & date. <input type="checkbox"/> Develop & send out training notice. <input type="checkbox"/> Identify/develop handouts and materials. <input type="checkbox"/> Develop visuals and trainer's notes. <input type="checkbox"/> Develop an evaluation form. 	<ul style="list-style-type: none"> ✓ Up-to-date mailing lists ✓ Model materials ✓ Model evaluations
Month 3	<ul style="list-style-type: none"> <input type="checkbox"/> Complete plans with co-trainers. <input type="checkbox"/> Walk through the logistics. <input type="checkbox"/> Conduct training event. 	<ul style="list-style-type: none"> ✓ Room (large group and breakout rooms) ✓ Flipcharts/videos ✓ Evaluations
Month 4	<ul style="list-style-type: none"> <input type="checkbox"/> Follow-up monitoring. 	<ul style="list-style-type: none"> ✓ Participant work plans

APPENDIX #13

5 D's Tip Sheet (Training Development Process)

D I R E C T I O N	
<ol style="list-style-type: none"> 1. Develop training purpose and goals. 2. Define desired training results as specific objectives and performance standards. 	<ul style="list-style-type: none"> ➤ Why are we conducting this training? ➤ What do we want to achieve? ➤ What do we want participants to know by the end?
D E S I G N	
<ol style="list-style-type: none"> 1. Assess participants' needs. 2. Decide what will take place and when. 3. Envision the flow of activities. 	<ul style="list-style-type: none"> ➤ How much do the participants already know? ➤ What would they like to learn? ➤ What do they need to learn? ➤ What specific topics will be covered in the training? ➤ In what order should the training activities take place?
D E V E L O P M E N T	
<ol style="list-style-type: none"> 1. Decide what teaching materials will be used. 2. Write and/or gather materials. 3. Plan how to get the word out about the training. 	<ul style="list-style-type: none"> ➤ Does anyone else have material that I can use? ➤ Can I adapt existing material? ➤ Who can help prepare the course material? ➤ Who needs to know that it will take place? ➤ What publicity will help people to self-select? ➤ What is the most effective way to teach these subjects?
D E L I V E R Y	
<ol style="list-style-type: none"> 1. Present the training event. 	<ul style="list-style-type: none"> ➤ Did I explain the goals to the group? ➤ Are there any last minute changes?
D E T E R M I N A T I O N	
<ol style="list-style-type: none"> 1. Follow up. 	<ul style="list-style-type: none"> ➤ What "next steps" came out of the event? ➤ Are the participants using the training back?

APPENDIX #14

Training Design Worksheet

Workshop/Course Title _____ # of Attendees Expected _____

Dates _____ Times _____ Target Audience _____

The learning objective is a change in:		Time Break into 30-minute segments	Topic (s)	Training Techniques	Resource Materials	Trainer (s)
Knowledge	Skills Attitude					

APPENDIX #15

Training Evaluation

Please take a moment to complete this evaluation form before you leave.

1. Topics/presenters you found most helpful?

2. Topics/presenters you found least helpful?

3. Topics you would suggest for future trainings?

4. Please rate the overall training.

Very Satisfied Satisfied Somewhat Satisfied Not Satisfied

Comments:

5. If there is one thing you would like to change in this training, what would it be?
