TRAINING VOLUNTEERS

Careful Planning and Effective Management — Qualities of a Successful Trainer

Compiled by Bob Presson

THE SKILLS NEEDED TO BE A SUCCESSFUL trainer are much like those of a successful administrator. There is no magic box or bag of tricks that makes one a trainer. Nor are trainers born with a special gift. Rather, trainers learn and develop their skills through hard work, careful planning and effective management.

As a trainer, the volunteer administrator's job is to prepare volunteers to perform a specific task or job. He/she helps the volunteer acquire the appropriate skills, knowledge and attitudes needed to perform an assignment. The trainer should be able to analyze what the volunteer's training needs are and to develop an understanding of the components of the job a volunteer is being trained to do.

Therefore, the trainer must keep in mind the four characteristics of an adult volunteer-learner group: heterogeneous composition, self-motivation, time perspective and self-concept. These qualities have significant implications for the design of a workshop or a training session.

- The **heterogeneous make-up** of a group of volunteers in a workshop or training session requires the trainer to be conscious of the fact that the aggregate of trainees represents a collection of individual and different skills, experience, tastes, likes and dislikes. Many times the group is a mixture of people of different ages, lifestyles, educational backgrounds and culture.
- The **motivation** that brings an individual to a training session must be understood. Those who attend a workshop for volunteers do so because they want to. They are self-motivated and ready to learn.
- It is important for the trainer to capitalize on the volunteer's "readiness" by making the most efficient use of the **participants' time.** Volunteers want to learn only what they need to know to prepare them to do their job. Anything more may be interesting but superfluous to their needs.
- Finally, the trainer must be aware of each participant's **self-concept.** It is a risk-taking experience to enter a training session—especially for adults who have been out of school for a number of years. They are understandably a bit uneasy and uncomfortable in their role as trainees. Therefore, it is the trainer's responsibility to build, not destroy, the self-concept or ego of the trainee.

Bob Presson is the director of VOLUNTEER's National Leadership Development Program, which sponsors training and workshop opportunities for those who direct volunteer programs or work with volunteers. The service provides predesigned and individually designed training experiences based on specific client needs.

The trainer must keep in mind these four special qualities of his/her training audience when planning and designing a workshop. Professor James D. Jorgensen of the University of Denver's Graduate School of Social Work has developed a fourteen-step planning guide for volunteer trainers. This checklist is a helpful tool in the preparation of a successful training program.

A 14-Step Planning Guide for Volunteer Trainers

By James D. Jorgensen, Ph.D.

Step 1. List the tasks which you expect volunteers to perform in your agency.

Step 2. List the specific **knowledge** that the volunteer must have in order to perform each task.
List the specific **attitudes** that must be present in order to perform each task. (Include attitudes that you wish to develop as well as negative or undesirable attitudes you wish to eliminate.)
List the specific **skills** that you must have in order to perform each task.

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Step 3. Develop specific learning objectives in relation to the knowledge, attitudes and skills identified in Step 2.
Remember:
- The objective must be observable or measurable.
- The level of acceptable performance must be specified.
- All the important conditions for performance must be listed.

Step 4. What content must be taught in order to achieve the learning objectives listed in Step 3?
What attitude training must be provided in order to achieve the learning objectives listed in Step 3?
What skill training must be provided in order to achieve the learning objectives listed in Step 3?

Step 5. What methods will be employed in delivering the knowledge, attitude and skill training? (Brainstorm. List all ideas, i.e., films, role play, tapes, etc.)

Step 6. Select the methods which you consider most likely to achieve your training objectives. Give a rationale for your selections.

Step 7. On the basis of the above methods, estimate the amount of time necessary to deliver your training program.

Step 8. Determine which segments of training will be provided as an orientation or pre-service training program.

Step 9. Determine which segments of training will be provided as in-service training.

Step 10. Order your training program, i.e., what do we do and in what order? Give a rationale for your ordering.

Step 11. Determine what training materials will be required, i.e., paper, pencils, flip charts, projectors.

Step 12. Identify the personnel to be employed in your training program.

Step 13. State how you intend to evaluate your training program.

Step 14. Try it. Evaluate and amend it as necessary. Try it again.

While careful planning is the key to successful training-workshop design, consistent management is fundamental to high quality training process and experience. Schindler and Chastain identify six management tools necessary to the trainer.

Six Management Tasks

From *Primer for Trainers*

By Arlene Schindler, Ph.D. and J. Dale Chastain

Some of the following tasks are performed simultaneously. They are rarely sequential, and a workshop leader generally performs several of them at the same time. Of the six tasks, no one is more or less important.

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Task 1: To Create and Maintain a Learning Environment. The trainer needs to develop an atmosphere conducive to learning. The workshop leader's development of the desired "mind-set"—a readiness to learn—prepares the participants for involvement, clarifies purposes, establishes the schedule, removes barriers to learning, and sets the tone for positive accomplishment. In developing the desired mind-set, workshop leaders have an opportunity to prepare themselves for the workshop.

Task 2: To Manage the Continuity Line. While the information line may be thought of as a smooth, uninterrupted flow of information, it is actually **uneven and broken.** The flow of information is disrupted by coffee breaks, changing from large group to small group activities, participant restlessness, differing personal agendas, and logistical mishaps. Consequently, the workshop leader must manage material, information, planned activities, mishaps, and individual participation so that the flow of information is continuous.

Management of the continuity line begins with the workshop leader's thorough, calculated development of the mind-set. It results from the arrangement of the facility, initial contact with the workshop leader, verification or revision of participants' expectations, and information about the workshop schedule, coffee breaks, lunch arrangements, and expected involvement of individuals.

Task 3: To Present Information. The presentation of information, an essential part of every workshop, must contribute to the creation and maintenance of a learning environment. Workshop leaders may rely on a lecture to present information. The lecture format may be appropriate, but only the most dynamic lecturer should present information without visual aids. Sometimes, information and explanations are so complicated that participants need additional help in order to understand what is being said. A visual aid is helpful in these situations.

An overhead projector is particularly helpful when developing concepts. A chalkboard, flipchart, pre-dawn chart, flannel graph, slides, movies, demonstrations—all are visual aids that add variety to the presentation and make the information significant. Moreover, visual aids add interest to long, involved presentations. Visual aids present explicit information which is essential to the workshop and upon which discussion can be based.

Participatory activities, whether group or individual, provide another way for the leader to present information. For example, brainstorming allows a group to generate many ideas in a very short time. Ideas processed from brainstorming activities can be used as the base for discussion and subsequent activities. Other group or individual activities, such as case studies, critical incidents, role-playing, simulation, in-basket, and fishbowl are methods for achieving specific workshop goals.

Task 4: To Process Information. The single most important contribution of a workshop leader is processing the contributions of participants and integrating them into the workshop content. In synthesizing contributions, the workshop leader is assisting participants to acquire new insights, perceptions and information. Without the workshop leader's skilled processing, participant comments and activities remain fragmented and unrelated.

Within the context of a workshop, processing is the technique by which the workshop leader **selects, clarifies** and **directs** participant contribution. It also

Resources

Making Change: A Guide to Effectiveness in Groups. Eileen F.N. Guthrie, Warren S. Miller. 1978. 199 pp. $6.95.
Making Change: Trainer's Manual. Guthrie, Miller, William Grimberg. 1978. 95 pp. $5.95. Both published by Interpersonal Communication Programs, Inc., 300 Clifton Avenue, Minneapolis, MN 55403.

These companion pieces offer a leadership development approach, oriented toward teaching people the skills they need to bring about positive change. The *Trainer's Manual* is to help the reader design training events in different contexts.

Primer for Trainers. J. Dale Chastain and Arlene K. Schindler, Ph.D. 1979. 21 pp. $2.00. Order from Women in Community Service, 1730 Rhode Island Ave, NW, Washington, DC 20036.

Contains basic information about workshops and the tasks and skills of the effective leader of workshops. Intended for the novice trainer, but includes many reminders for the experienced leader as well.

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ncludes the translation of **opinion, experience** and **illustrations** into the conceptual framework of the workshop. As the workshop leader relates otherwise isolated pieces of information, the participant is guided to an ncreased awareness, a broadened scope of relevance, an understanding of a new totality, and an opportunity for application of new insights to persona and professional behavior.

Each ingredient in the processing "mix" must be considered by the leader. There are **participants,** each of whom is unique. They may have many similarities, but each participant brings a **different perspective** conditioned by age, sex, work experience, family background, education, religion, professional training, and other factors. The **workshop framework** is another ingredient with purposes, content, technique, activities and discussion. Common experiences are created through participant sharing in activities and exercises within the workshop. The paramount ingredient is the **workshop leader** who may be kened to the orchestra conductor—selecting, encouraging, signaling, leveling, extending, compressing, molding—whose direction produces harmony from the cacophony of disparate elements.

Task 5: To Direct and Monitor Activities. Successful activities begin with **clear instructions** demonstrating the significance of the activity to the workshop purposes and indicating the method of accomplishing the activity. Instructions must describe the logistical rearrangements, explain the organization of small groups, present the task, and set the time for the activity.

Most of us believe that we can give clear instructions, but instructions in a workshop should always be verified. If the entire group is to work on a single activity, request a participant to repeat the instructions. If the group is divided nto clusters, then have a member of each small group repeat the instructions. If the instructions, as repeated, are not accurate, then reteach the instructions followed by yet another opportunity to verify participants' understanding.

Workshop leaders must continually **monitor** small group activities. Small group activities are not a signal for a workshop leader "break." The workshop leader must circulate among the small groups verifying instructions, tasks and purposes. This must be accomplished with no attitude of supervision, yet the workshop leader must make certain that the group understands the activity. These insights will assist the leader in encouraging and handling the discussion among participants. Monitoring requires the skill of unobtrusive eavesdropping, and the intervention of the workshop leader to correct subtly and refocus emphasis must not disrupt the interaction of the participants.

Task 6: To Manage Individual Participation. Group management is always of primary concern to workshop leaders, and of special concern to those with limited experience. If there is lack of involvement, excessive involvement or hostility within a group, the leader needs to analyze the cause and take corrective actions. Paramount in the management of groups is an understanding of the interrelations among people and how these contribute either to a positive or negative dynamic within the group.

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The following books may be ordered from Volunteer Readership, a service of VOLUNTEER, The National Center for Citizen Involvement, at PO Box 1807, Boulder, CO 80306. Please add shipping/ handling charge of $1.50 for orders up to $10; $2.75 for orders from $10 to $25; $3.75 for orders over $25.

MiniMax: The Exchange Game. Putnam Barber, Richard Lynch and Robin Webber. 1979. Notebook kit. $21.95.

MiniMax is a workshop or meeting exercise that encourages participants to share information and skills. The game can be used as an icebreaker, a climate-setting exercise and as a model for building cooperative networks among staff and volunteers, agencies within a community, etc. Kit includes complete step-by-step instructions, playing cards for up to 50 participants, flip chart sheets, and background on how to use MiniMax.

Volunteers Today: Finding, Training and Working with Them. Harriet Naylor. 1973. 198 pp. $5.55.

Contains sound principles and practices for administrators, executives and professionals of the helping fields. Topics include trends in administrative volunteering, volunteer-staff work patterns, motivations, clues for volunteer assignments, designing training events and numerous useful diagrams and forms.

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Training Volunteer Leaders: A Handbook to Train Volunteers and Other Leaders of Program Groups. National Council of Y.M.C.A.'s. 1974. 190 pp. notebook. $9.00.

Provides a comprehensive training program for leaders of small groups, organized according to functions and competencies deemed helpful in carrying out each function. Exercises are employed to stimulate attitudes, knowledge, skills and understanding as they relate to a specific competency. Subjects explored include feedback processes, role playing, group climate, motivational forces, problem solving, self evaluation, guidelines for change and life goals.

Volunteers: How to Find Them . . . How to Keep Them! Mike Haines. 1977. 73 pp. $4.50.

A workbook that can be used in a workshop setting. Divided into three sections: preparation for the volunteer program; interviewing, orientation and training; and recruitment methods. Appendices include forms, some training methods and news releases.

The Workshop Planner. Gwen Winterberger. 1976. 44 pp. $3.00.

Covers the practical essentials of workshop and conference planning, including simple control forms and reminder checklists. Topics from A to Z—assessment, content, design, evaluation, faculty, questions, time, zeal.

Profile — Training Volunteer Leaders for the BSA

By Mike Whittaker

When someone volunteers for the Scouting movement, there is no sweet talk. The person is warned that he or she is taking on a challenge. The responsibility for thirty to forty young persons will depend on him/her.

It means that at least one evening a week must be devoted to America's youth. It means at-home planning. It means a volunteer must be as ready as the Scout motto demands: "Be prepared."

More than one million adults take part in activities of the Boy Scouts of America, one of the nation's largest users of volunteers. They help Cub Scouts, Boy Scouts and Explorers. "They benefit, too," says Robert G. Maxfield, director of volunteer training for the Scouts. "They keep young by working with youth and they learn new skills that can be useful in their private lives."

Scouting's pool of volunteers comes from such diverse groups as churches, PTAs, labor unions, police departments and airlines associations because each pack, post or troop must be chartered to an organization. It takes the various Scouting districts and councils to turn the volunteers into active participants.

"It is an ongoing task to get the leaders that Scouting needs," Maxfield says. "It takes a firm commitment. We are lucky that we have a great reservoir of former Scouts. They know what it is all about."

Besides leadership, Scouts need other kinds of help. "The father who can join a Scout overnight encampment, the secretary who can type up our newsletter, a local expert, a mechanic," Maxfield says, "all these individuals are what make Scouting succeed."

But the "upfront" people—the volunteer Scoutmasters, Cubmasters and den leaders, and Explorer advisers—are what make Scouting function. "One of our problems has been in training leaders," Maxfield admits. "When only seven out of ten unit leaders in the Scouts are trained we still have lots to do to get those other three. It is a never-ending project to boost the level of training."

How is this done?

- Personal contact, stressing the advantages of training, is usually made with each new leader.
- The value of such training is stressed to the chartered organization involved in the form of a simple message: "John Doe is representing your organization. We want what he does to reflect well on both your

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organization and ours. We want the youngsters in Scouting to benefit from the program."

- Volunteers are rewarded with badges, trophies and certificates of appreciation for their work. Such recognition instills a desire to be worthy of the awards.

Training usually takes the form of a group activity. Trial and error has shown that a new leader can benefit from the experiences of others in the same situation. Several instructors teach the various topics.

One thing they stress is that the Scouting movement is fun. Youths are attracted to Scouting because they know they'll be doing more than tying knots. They want to learn and have a good time. "Fun takes planning," Maxfield says. "It is like a comic delivering a joke. There is a buildup—and then the punch line. Training gives the buildup. It is the local leader who has to follow through."

Training for Cub Scout leaders is slightly different from Boy Scout leadership training. There are nine different training sessions available to them. A den leader will take four, while a Cubmaster will participate in five training sessions. Also, more volunteers are needed for the Cub Scout program than for the Boy Scouts because of the younger age of the Cubs. "The younger kids need more supervision," Maxfield says. "Therefore, our training of Cub Scout volunteers is more individualized."

This initial training provides the volunteer with a knowledge of the purpose of the program and an understanding of the basics of the Scouting philosophy. The new leader will also learn how to perform the tasks necessary for running a Scouting unit and for a well-balanced, year-round program of activities. He/she also will gain some insight into the characteristics of youth and how to deal with behavior problems.

Boy Scout leaders are taught such subjects as camping, counseling, finance, leadership, effective teaching methods. They can participate in special training programs for involving handicapped youths in Scouting and for teaching Scouts skills in a variety of fields.

The training is reinforced by a series of monthly leaders' roundtables where ideas and skills are exchanged. BSA has found peer support to be one of the best ways of deepening a volunteer's dedication. As a result, the roundtables also generate new enthusiasm for the Scouting movement. "Sharing of experiences," Maxfield says, "has been shown to be a great reinforcement. Knowing that someone else has been through the same problem and how they handled it gives volunteers a lift."

An annual "show-an-do," held by most of BSA's 416 local councils, combines troop leader activities with major training programs for youth. For instance, it might be learning to use a compass to identify various plants in the area. Adults form "patrols," which perform a series of these activities in competition with other groups. The show-an-dos usually take place at an outdoor camp.

For experienced volunteers who need more specialized training, the Scouts maintain a training center at the Philmont Scout Ranch and Explorer Base—a sprawling 214-square-mile wilderness area near Cimarron in northeastern New Mexico. Up to 500 leaders participate in week-long training sessions. Thirty-eight such sessions will be held at the ranch during 1980.

The most advanced Scout training is the Wood Badge—an outdoor experience lasting eight days and seven nights. Volunteers "rough it," while gaining knowledge and enjoying the wilderness. The experience enables them to return home with skills of the Scout method that will help their youth members learn about survival in the wilds.

Not all volunteers will advance this far, but the BSA training program purposefully is set up to encourage leaders to go as far as they can—breaking out of the normal confines of job and home.