

SECTION B

TRAINING DESIGN

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Chapter 1

Decision Making about Pre-Service Training

Chapter 1

Decision Making about Pre-Service Training

Before attempting to design a training event, one should have answers to the why, what, who, where, and how questions.

-- Paraphrased from Pfeiffer and Ballew,
Design Skills

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SCOPE

This chapter is designed to help you as an AmeriCorps program make some basic decisions about your pre-service training (PST), such as:

- **Why** PST is needed and what outcomes you hope to accomplish.
- **What** pre-service training will be provided -- and what part of it will be centralized versus decentralized, and focus on the program as a whole versus specific projects.
- **When** centralized PST will begin and end, and when any decentralized PST will be scheduled.
- **Where** the PST will be held.
- **Who** will be responsible for designing and implementing the PST.
- **How** the PST should be organized and planned.

This section provides a three-part process for answering these questions:

- Part #1: Gathering Information for Decision Making
- Part #2: Holding Decision-Making Meetings
- Part #3: Preparing a PST Workplan

IMPORTANCE

As an AmeriCorps program, you must make some important decisions about PST.

The Corporation for National Service believes that members should receive orientation. Many programs provide this orientation as part of a structured pre-service training program, designed to prepare members for a successful AmeriCorps experience. CNS indicates three types of objectives for pre-service training (see the shaded box on the following page).

CORPORATION FOR NATIONAL SERVICE MEMBER ORIENTATION AND TRAINING

Programs are required to provide members with the training, skills, and knowledge, they need to perform well in their assigned service project. Programs as a whole must allocate at least 80% of the required participation to direct service activities and no more than 20% of the required service hours to education, training, and other non-direct service activities.

Member Orientation -- Core topics for initial member orientation should include:

- The big picture of National Service (the new AmeriCorps video, *Getting Things Started* is a good tool), including the following topics:
 - ◆ The history of service in America
 - ◆ The AmeriCorps network of over 600 programs and more than 40,000 members
 - ◆ A discussion of the AmeriCorps ethic
 - ◆ The importance of getting things done
 - ◆ The meaning of community
 - ◆ The doors of opportunity that will open through service
 - ◆ The responsibilities that individuals have to themselves, their families, their community, and the nation.
- Program rules, regulations, and benefits, including the contents of the *Member Handbook*, program operating policies (timesheets, living allowances, etc.), the role of staff versus that of members, understanding the objectives of the program and how to collect data, encouraging members to register to vote, and background information about the community or natural environment.

Member Training -- Training should be an ongoing part of your program, including:

- Training for assigned service activities including skills training (such as tutoring, mentoring, blazing trails, immunization education and outreach, etc.), working with volunteers, cross-cultural sensitivity, and teambuilding.
- Training to develop members, which may include communication, conflict resolution, CPR/First Aid, and life after AmeriCorps (these are suggested topics -- each program will determine their own training needs).

You should also use service experiences to help members improve their skills, internalize project goals and increase their insight.

Source: Adapted from Corporation for National Service, IV. Member Training and Supervision, *Program Director's Handbook for AmeriCorps*State & National*. Washington, D.C.: October 1995, p. 13, and Corporation for National Service, *1997-98 Program Director's Handbook*. Washington, D.C.: September 1997, pp. 22-23.

Each program must decide how to provide PST, what preparation should be centralized versus decentralized, whether to focus on the overall program versus specific projects, who will develop the training design, how PST will be structured, what training methods will be used, etc. -- a whole range of decisions that will help determine the success of the PST experience.

**LESSONS LEARNED:
PST IS IMPORTANT!**

The first group of AmeriCorps grantees found during their first year that PST can be extremely important to the success of their AmeriCorps programs, helping to build a sense of affiliation with the National Service Network and ensure that members arrive at their host organizations with an understanding of program philosophy and a base of practical, assignment-related knowledge and skills.

Other national service programs such as Peace Corps, AmeriCorps*VISTA, and Foster Grandparents have also found pre-service training important in teambuilding and in ensuring consistent participant preparation for assignments.

Your organization may have extensive experience in training volunteers or interns, so you are aware of the many choices to be made and the probable advantages and challenges of various approaches to pre-service training. You may have training experience but with very different projects or member groups. Or you may have done little or no training.

This chapter helps you to identify all the factors or issues to consider in designing PST so that you can make informed decisions about your own PST -- and learn from the experience of other programs rather than "reinventing the wheel" by operating in isolation. If you already have experience with PST, use this chapter as a double-check on your own planning. This chapter also helps you to document the decision-making process

-- providing an institutional base for future PST planning and for evaluating the PST experience.

TARGETED USERS

This chapter is designed for use by the individual or group of individuals responsible for making decisions about pre-service training for your AmeriCorps program. The group should include senior program personnel, especially the Project Director and those directly responsible for coordinating or providing the pre-service training. If PST design will be a collaborative process, the "design team" -- which may include collaborating partners, host agencies and supervisors, and members -- should use some of the materials as a group.

EXPECTED LEARNING

Using this chapter should help you identify important considerations and decision areas and make key decisions about your pre-service training, as well as develop a workplan for designing and implementing PST.

RELATED CHAPTERS

Be sure to read the Introduction to this manual before using this chapter. Reading through the other Training Design chapters will provide a broader picture of the PST process and help in your decision making. All the Training Design chapters are closely related.

Hints: If you have very little time available to plan your PST, start by looking at *Less than a Month to Plan? Tips for a Short PST Design Process*, page 159, in *Chapter 5: Supporting Materials*.

A brief review of the entire manual prior to detailed use of this chapter is helpful to put the decision-making process into context and suggest the range of topics which might be covered in PST.

OTHER THINGS YOU SHOULD KNOW

- There is no one right way to do PST. Learning to make PST effective is an ongoing process. Recognize this, be prepared to modify and refine as you go, and document so you can do better each time.
- This chapter is especially useful at the very beginning of your PST planning process. However, it can also be used

later in the process, to provide a review and determine whether any important factors were forgotten in the earlier planning. It can also help you determine your in-service training needs and process.

- Many experienced AmeriCorps program staff are willing to talk to you about the steps in this chapter. Call people you already know, ask your CNS program officer to give you the names of experienced program staff doing similar training, or contact the National Service Resource Center and use their "listserv" to exchange ideas with other program staff.

RESOURCES: WHAT IS A LISTSERV?

A listserv, often called a discussion group, is a mailing list of people who exchange information about a common interest through Internet e-mail. Subscribing to a listserv adds your e-mail address to the mailing list to receive messages sent by anyone on the list. Likewise, messages you send go to everyone on that list. There are thousands of Internet listservs, and many related to national service including:

- Learn and Serve America (nslck-12)
- AmeriCorps (AClist)
- VISTA (VISTAnet and VISTA-L)
- National Senior Service Corps (NSSCtalk)

Subscribing to a national service listserv gives staff of national service programs access to messages from the Corporation for National Service, legislative updates, program specific bulletins, and more. Listservs also help directors share resources, discuss issues affecting national service, and get more involved in the expanding national service network.

To subscribe to these listservs, see the Corporation's website (<http://www.cns.gov/resources/listserv.html>).

Source: Adapted from the Corporation for National Service website (<http://www.cns.gov/resources/listserv.html>).

PART #1: GATHERING INFORMATION FOR DECISION MAKING

SCOPE:

This activity identifies the range of information about your program that needs to be considered in making basic decisions about your pre-service training session. A *PST Information and Needs Assessment Form*, page 33, is included to help you gather the information. The activity also suggests a group of people who should be a part of this decision-making process.

WHO SHOULD PARTICIPATE:

Include the people responsible for basic decisions about PST. You may want to put together a PST "design team" to make key decisions and be responsible for planning. A PST design team might include the following:

- **Key AmeriCorps program personnel** -- Executive Director, Training Director, and/or other senior program staff
- **Senior personnel of collaborating partner agencies**, including state or regional coordinators, lead agencies for particular types of programs or priority areas, or other collaborating partners
- **Host site representatives**
- **Current AmeriCorps members**

See *Hints for an Effective PST Design Team*, page 155, in *Chapter 5: Supporting Materials*.

TIME REQUIRED:

Several hours of effort are needed to complete the *PST Information and Needs Assessment Form*. You will probably need information from AmeriCorps program, collaborating partner, and host site personnel.

MATERIALS NEEDED:

To complete the *PST Information and Needs Assessment Form*, you will need the following materials:

- A copy of your AmeriCorps proposal
- If this is not your first year, curriculum, evaluations, and other materials from past PSTs

**RESOURCES:
FINDING A MEMBER TO HELP WITH
PST DESIGN**

Many AmeriCorps grantees stress the importance of member input to training design. One way to ensure such input is to ask a current or former AmeriCorps member to serve on or advise your PST design team.

If your program is new and you need help in finding someone, you may want to contact AmeriCorps Alums, Inc. or the AmeriCorps Leaders Program, which selects and trains members to assist AmeriCorps programs. Contact:

AmeriCorps Alums, Inc.
Telephone: (202) 337-2562
Fax: (202) 337-3231
E-mail: acorpалums@aol.com
Website: <http://www.americorpsalums.org>

or

AmeriCorps Leaders Program
Corporation for National Service
Telephone: (202) 606-5000
TDD: (202) 565-2799
Website: http://www.cns.gov/resources/ac_leaders.html

- Any written information on member training needs from meetings, self-assessment forms, or other member contacts (see the *Member Training Needs and Skills Assessment Form*, page 165, in *Chapter 5: Supporting Materials*)
- Any written information on member training needs from collaborating partners and host sites

OBJECTIVE:

To gather and share with your design team all the information which needs to be considered in making basic decisions about your PST.

DIRECTIONS:

Decide on the composition of your PST team. The more people involved in the decision making, the more important it is that everyone have a common base of information.

PST design team members should review the *PST Information and Needs Assessment Form* and decide who has the information to complete each section. Most of the information can be compiled by program staff, but several sections require content input from collaborating partners. Agree on a deadline for getting all information to the person coordinating completion of the form. Send a copy to each design team member or make it available for review and discussion at the beginning of your first major PST decision-making meeting (see Part #2, page 41).

The form includes some notes in italics which suggest how certain information is important to your PST decision making.

Use the information compiled for this form to help you make major decisions about pre-service training, such as:

- **Whether PST will be entirely centralized or partly or entirely decentralized** -- held at a single location for all members or held at several sites by different partner organizations or host agencies.
- **The extent to which PST will focus on training needs identified for the entire program versus training needs specific to a particular service site or project.** Program-focused training tends to emphasize general or cross-cutting skills (such as group problem solving, conflict resolution, or communication), while project-focused training often emphasizes technical skills needed for particular assignments (such as how to conduct home visits for a parent education project or how to work with teenagers in a public safety project).
- **The location, duration, and logistical arrangements of the PST.**

IS YOUR TRAINING ACCESSIBLE TO PEOPLE WITH DISABILITIES?

Often you will decide on a location for your training before you recruit members, so it is important to choose a facility that is accessible to people with disabilities. Using the Accessibility Checklist provided by Access AmeriCorps, evaluate all training facilities you are considering. Ask not only if they are accessible, but what aspects of their facility provide for accessibility. In particular, ask about the bathrooms. Facilities often have wheel-chair accessible entrances but may have bathroom stalls too small to accommodate wheel chairs, or large stalls with improperly placed or no grab bars. In many older facilities, access to some meeting rooms requires taking a few steps up or down. Examine each room you plan to use, to ensure all areas are accessible by ramp or elevator.

Check hotels or restaurants you might use to see that they are accessible as well. Also consider carefully the set-up of outdoor activities or community projects to be sure they do not exclude people with disabilities.

If you have any questions about accessibility, contact:

Access AmeriCorps
United Cerebral Palsy Associations (UCPA)
1660 L Street, N.W., Suite 700
Washington, DC 20036

Telephone: (202) 776-0406

Fax: (202) 776-0414

E-mail: accessamericorps@ucpa.org

Website:

<http://www.ucpa.org/html/innovative/americorp/index.html>

PST Information and Needs Assessment Form

Fill in the form, and attach appropriate materials. Some of the information will need to come from collaborating partners and service sites.

Date: _____ Completed by: _____

A. Program Structure

1. **Identify the different levels and collaborating partners involved in your program -- levels at which pre-service training might be provided** (check all that apply):

☐ Grantee or program level (national, state, or local)
☐ Collaborating partner agencies with multiple service sites and locations
☐ Local service sites
☐ Other (specify _____)

2. **What is the operating scope of your program?** (Check one)

☐ National/multi-state
☐ Region or several counties within a state
☐ One state
☐ One metro area, city, or county

3. **How many different host agencies will supervise members?** _____
How many different sites are involved? _____

4. **If you were to plot the sites on a map, what is the approximate maximum distance between sites?** _____

If possible, identify a "central" location that would minimize or equalize travel time and costs for PST. _____

5. **Identify the priority areas in which your AmeriCorps members will be working, and list the different types of service assignments or positions members will hold** (e.g., in-school aide, tutor, parent liaison, housing counselor, etc.), listing separately every assignment that will require project-specific knowledge and technical skills. (Attach additional pages if necessary.)

Priority Area

Assignments

___ **Education:**

Priority Area

Assignments

___ **Environment:**

___ **Human Needs:**

___ **Public Safety:**

B. MEMBERS

1. How many members will you include in this PST? _____

2. How many will be: ___ Full-time ___ Part-time

3. How many members will be returning for a second year? _____

(If some are returning, you will need to decide whether they participate in some or all of the PST or whether they can help in PST design and training.)

4. Will members be from (check all that apply):

___ The same communities in which they will be assigned

___ The same county or metro area or commuting area as their place of assignment

___ The same state or multi-state region as their place of assignment

___ Anywhere in the country

(Where members live helps determine travel costs and may influence the decision to provide centralized or decentralized, residential or during-the-day PST.)

5. Special Factors

a. Identify any special factors that may limit the ability of members to come together for centralized PST (e.g., mothers with child care needs, school or other commitments, etc.)

b. If you will have part-time members, identify any limitations on your ability to get them together for PST (such as child care, school, or another part-time job).

- c. **Identify any special factors that may affect the choice of a facility for PST** (e.g., persons with disabilities, persons who need to be within reach of health services, etc.)

6. Describe expected member characteristics and diversity

- a. **Educational level**
- b. **Socioeconomic status**
- c. **Work experience**
- d. **Urban/rural backgrounds**
- e. **Other (specify)**

C. What has Already Been Decided about Your PST

(If you have already made certain decisions, review them, be sure design team members are familiar with them, and see whether any changes are needed.)

- 1. Do plans already exist for orientation or PST?** ☐ Yes ☐ No

- 2. If yes** (check all that apply):

- ☐ Does a PST design exist from a prior year?
- ☐ Was a plan included in the proposal to AmeriCorps?
- ☐ Has a planning grant or other activity led to an agreement among collaborating partners about PST?

(If you conducted PST last year, see Part E of this form for a review of what was learned.)

- 3. Is money budgeted for PST?** ☐ Yes ☐ No

If yes, approximately how much money is available? \$ _____

If no, is there a way to make some resources available for PST, and if so, how much?

☐ Yes ☐ No Amount: \$ _____

4. Describe any specifications for PST which are stated in the proposal or in an existing PST plan (if none, skip to Part D of this form):

a. Centralization versus decentralization -- Will the PST be (check all that apply):

- ☐ Held in one central site
- ☐ Held in several regional or project-focused sites
- ☐ Held at each service site
- ☐ Other (specify) _____

b. Timing -- when will PST occur (approximate dates)?

c. Duration -- how long will PST last?

d. Location -- in what area or specific site will PST be held?

e. Curriculum or focus -- what will be included (*If part will be centralized (C) and part decentralized (D), indicate the content of each segment by using a "C" or "D" instead of a check*)

- ☐ Orientation to AmeriCorps, administrative information
- ☐ Teambuilding and affiliation with the National Service Network
- ☐ General or cross-cutting knowledge and skills needed by all members
- ☐ Specific knowledge and skills needed for particular assignments
- ☐ Other (specify) _____

Attach any existing curriculum or materials.

f. Community projects -- what projects, if any, are specified for implementation during the PST?

g. Other specific content information -- is an Outward Bound-type wilderness experience or other specific activity described?

h. Participation -- in addition to members, which of the following will participate:

- ☐ Crew/team supervisors
- ☐ Host site supervisors
- ☐ Regional coordinators
- ☐ Collaborating agency staff
- ☐ Other (describe) _____

How and to what extent will each participate?

- i. Design** -- who is to design the PST (check all that apply)?
 - ☐ Grantee personnel
 - ☐ Collaborating agency personnel
 - ☐ Host site personnel
 - ☐ Consultants
 - ☐ Other (specify) _____
- j. Delivery** -- who will serve as trainers (check all that apply)?
 - ☐ Grantee personnel
 - ☐ Collaborating agency personnel
 - ☐ Host site personnel
 - ☐ Consultants
 - ☐ Other (specify) _____
- k. Evaluation** -- who will evaluate the pre-service training and how?
- l. Other aspects of the PST that are already determined**

D. Project- or Host-Site-Level Training

- 1. To what extent do collaborating agencies or host sites plan to provide project-specific training:**
 - a. Does the program require that host sites provide project-level training for members prior to their starting an assignment?**
☐ Yes ☐ No ☐ Varies by site/project
 - b. If not, are some collaborating agencies or host sites planning to provide it anyway?** ☐ Yes ☐ No ☐ Varies by site/program
- 2. If project-specific training is provided:**
 - a. Who is responsible for providing such training (check all that apply)?**
 - ☐ Your organization
 - ☐ Collaborating agencies
 - ☐ Host sites

- b. **Describe plans for this training.**

- c. **How will you ensure that the program-level training complements the project-level training?**

- d. **If information exists about planned training for each type of project assignment, attach it** (see listing in question A.5.), including duration, location, focus, whether written materials exist, and training methods planned.

- d. **If no planning has been done for project-specific training, indicate how you plan to encourage this planning.**

E. Capacity and Experience

- 1. **If you have already done PST in past years, what lessons have you learned from that experience that will lead to modifications in this year's PST?** (Attach evaluation reports or other written information if available.)

- 2. **Which, if any, of the groups involved with this program have significant experience in designing training similar to PST** (check all that apply)?

| | Design | Delivery | Evaluation |
|--------------------------------|--------|----------|------------|
| AmeriCorps program personnel | ___ | ___ | ___ |
| Collaborating agency personnel | ___ | ___ | ___ |
| Host site personnel | ___ | ___ | ___ |
| Other (specify) _____ | ___ | ___ | ___ |

- 3. **How accessible and willing are they to help you with the PST?**

F. Corporation for National Service and Other Requirements

Review Corporation for National Service orientation guidelines (shaded box in the Introduction to *Section C: Training Topics & Activities*, page 235, and this chapter, page 25) and identify any other requirements for PST set by the AmeriCorps program, collaborating agencies, and/or host sites. For example, host sites may require specific training for members with certain kinds of assignments. Summarize or attach that information.

G. PST Needs Assessment Information

Summarize or attach any information you have collected concerning the PST needs for your program.

- a. If this is your first year running an AmeriCorps program:** Indicate any information from members, previous experiences with similar programs, host sites, or collaborating agencies. Include any results of focus groups or other assessments of member training needs. If you do not have any information about the training needs of incoming members, you may want to call host sites or consult directly with some members about their perceived training needs; a suggested *Member Training Needs and Skills Assessment Form*, page 165, is included in *Chapter 5: Supporting Materials*.
- b. If this is not your first year:** If you do not have any information from members, you may want to ask host sites to consult informally with current members about their perceived training needs and the appropriate balance among the four major types of content (see question C.4.e.), or arrange focus groups or other discussions with members as a part of your design process. See *Chapter 2: Developing a PST Plan/Package*, page 63, for additional suggestions on how to do this.

PART #2: HOLDING DECISION-MAKING MEETINGS

SCOPE:

This activity helps guide you through one or several meetings designed to help you make informed decisions about the parameters of your PST.

WHO SHOULD PARTICIPATE:

Include whoever is responsible for decision making about PST.

If the PST will be jointly designed and implemented, you may want to include a design team as suggested in Part #1 -- key AmeriCorps program personnel, senior collaborating agency personnel, host site representatives, and members.

LESSONS LEARNED: CENTRALIZATION AND PROGRAM- VERSUS PROJECT- FOCUSED TRAINING

Current grantees have found that one of the most important decisions about PST is the relative emphasis to place during training on content related to the entire program, such as administrative information, affiliation with the National Service Network and teambuilding, and general or cross-cutting knowledge and skills, versus project-specific knowledge and skills.

If your members will have diverse assignments in multiple priority areas, then centralized training can focus on affiliation with the National Service Network and teambuilding, administrative information, and cross-cutting skills, and decentralized training can provide the specific technical skills related to particular projects or service sites. One grantee reports that:

After conducting two large pre-service training events, I wish we had left more project-specific training to the host sites and spent more time on teambuilding, administrative information, and cross-cutting knowledge and skills.

Other grantees suggest that if all your members will be carrying out similar assignments, it may make sense to centralize all the training and provide both general or cross-cutting program and technical project knowledge and skills in the same location.

TIME REQUIRED:

At least two to three hours for an initial key decision-making meeting of the PST design team, followed by subcommittee or individual work and one or two additional meetings as needed.

MATERIALS NEEDED:

- Easel pad, markers, and masking tape
- Copies of the completed *PST Information and Needs Assessment Form*, page 33, from Part #1, with attached materials
- Copies of the *Decision Worksheets* (attached)
- Roster of all design team members

OBJECTIVE:

To make key decisions about a PST for your program.

DIRECTIONS:

Prior to the meeting:

1. Decide who will chair the meeting.
2. Develop a meeting agenda -- use the *Sample PST Decision-Making Meeting Agenda*, page 157, in *Chapter 5: Supporting Materials* as a starting point.
3. Decide which worksheets you will use and modify them as needed. Use at least *Decision Worksheets A: Desired PST Outcomes* (page 45) and *B: Key Decisions* (page 51) at your meeting; review the others and decide whether they will be used during or after the meeting.

**LESSONS LEARNED:
LOGISTICS**

Many AmeriCorps programs have found that one of the greatest challenges they face with pre-service training involves logistical arrangements -- finding and arranging for an appropriate training site; making sure that medical personnel, a pharmacy, and other emergency services are available; and being sure all the needed materials and equipment are on-site and available when training begins. This manual contains a *Sample Logistical Arrangements Checklist* on page 219 to assist you.

4. Get the agenda and worksheets out to PST design team members before the meeting, along with a copy of the completed *PST Information and Needs Assessment Form*, page 33, from Part #1.

At the meeting:

5. Use the agenda and worksheets to make key decisions about PST.
6. Determine what decisions require additional consideration by subcommittees or individuals and give a different group responsibility for each worksheet or major decision area.

Following the meeting:

7. Send out minutes summarizing discussion and decisions, along with copies of decision worksheets.
8. Follow up with individuals responsible for additional work and decision making.

Decision Worksheet A: Desired PST Outcomes

Use this worksheet and the attached chart format to determine the desired outcomes of your pre-service training -- so you can make key decisions about the PST session. This information is important input to the key decisions about the scope and content of the PST, and how much of it should be centralized versus decentralized. You might try to identify outcomes prior to the initial decision-making meeting, or these outcomes could be determined at the meeting.

LESSONS LEARNED: AFFILIATION/TEAMBUILDING VERSUS SKILL DEVELOPMENT

Some AmeriCorps grantees report that they tended to heavily emphasize *either* affiliation and teambuilding *or* skill development in their first pre-service training, rather than providing both. After several training experiences, they now feel it is important to provide a balance between these two different aspects of PST.

1. **List the desired member outcomes.** Consider the following sample list and add, delete, or modify as appropriate. What knowledge, skills, and attitudes does the decision-making team feel are most important? (You can transfer these outcomes to the *Chart of Desired PST Outcomes*, page 49, which follows.)

Affiliation with AmeriCorps National Service Network and Teambuilding:

- a. Members will feel a strong sense of affiliation with the AmeriCorps National Service Network and with this AmeriCorps program.
- b. Members will have developed a strong sense of teamwork with the other members who will be working in the same host site, same geographic area, and same program priority area.
- c. Members will have developed and be able to demonstrate basic communication skills.
- d. Members will have learned and be able to demonstrate CPR and First Aid skills.
- e. Members will have learned basic concepts and applications of conflict resolution techniques and be able to describe ways to apply them in their AmeriCorps assignments.

Administrative Information:

- f. Members will know and understand basic administrative and program requirements of AmeriCorps, as stated by the Corporation for National Service.
- g. Members will be able to read, use, and understand AmeriCorps forms and reports.

General or Cross-Cutting Knowledge and Skills:

- h. Members will be prepared to work in diverse member groups and with diverse organizations and communities.
- i. Members will have developed skills in working effectively in groups -- planning, problem solving, running meetings, negotiation and conflict management, and related skills.
- j. Members will understand their own leadership styles and those of other people, concepts of situational leadership, and their implications for the AmeriCorps experience.
- k. Members will have the skills needed to help conduct community needs assessments, establish and maintain positive relations with community members, and encourage community involvement in programs.
- l. Members will have had practical experience in planning, implementing, and evaluating at least one community project.
- m. Members will have the office and professional preparation to work successfully within the organizations to which they are assigned.
- n. Members will be prepared to document, reflect upon, and evaluate their AmeriCorps experiences.

Project-Specific Knowledge and Skills:

- o. Members will have developed specific objectives and project plans for their own AmeriCorps assignments.
- p. Members will have the programmatic and technical knowledge and skills needed to carry out their individual assignments successfully.

q. Members will have completed targeted needs assessments for their community or project.

2. **List other desired outcomes.** These might relate to service site supervisors, host agencies, or other individuals or entities. Put them onto the chart.
3. **Indicate which of these outcomes must be accomplished through centralized training and which could be left to service sites and host agencies.** Use the second column of the chart to record this information. (Later in the design period, you can expand this chart to identify training topics to include in your PST.)
4. **Now prioritize these outcomes.** First, look at the outcomes you have entered onto the chart, and review the list of outcomes you have indicated should be handled through centralized PST, rather than through training provided at a decentralized level. Then determine which of these outcomes are high, medium, or low priority. You can indicate priorities in column three of the attached chart. (This will help you decide appropriate PST length, and will be useful later on, as you develop your PST agenda and curriculum.) You may not be able to cover all the listed outcomes in pre-service training. Low or medium priority outcomes may form the basis of your in-service training plan.

Chart of Desired PST Outcomes

| Desired Outcome | Centralized or Decentralized | Priority |
|-----------------|---------------------------------|----------|
| | | |
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Decision Worksheet B: Key Decisions

This form summarizes key decisions you need to make about your PST. Many of them can be made at your initial decision-making meeting. Refer back to various parts of the *PST Information and Needs Assessment Form*, page 33, and the completed *Chart of Desired PST Outcomes*, page 49, during the decision-making process; parts of special importance for particular decisions are identified. **The design team should discuss these questions thoroughly before making decisions, especially the first three.**

- 1. What pre-service training will be provided?** Should the program provide all PST directly and centrally, or should PST be entirely or partially decentralized and provided by collaborating partners or host sites? For example, there might be one week of centralized PST and one week of decentralized PST, or all training might be combined at a central location.

(The information from Parts A and B of the PST Information and Needs Assessment Form and the completed Chart of Desired PST Outcomes will help you make this decision.)

- 2. Why is PST needed?** What outcomes do you expect to accomplish? *(Use the results of the Chart of Desired PST Outcomes to help make these decisions.)*

- 3. How should the PST be organized and delivered?** What should be the mix of program- and project-focused training? What will be the training philosophy and emphasis?

(The information from Part D of the PST Information and Needs Assessment Form will help you make this decision.)

- 4. When should PST be scheduled?** Consider timing for both centralized and decentralized PST. Try to indicate a "window" for the PST -- the date by which it must be completed, and if possible, the earliest date it could begin. What is the maximum feasible length? What is the minimum length to do meaningful PST? (Consider content needs, costs, member factors, whether you want members to do a community project during the training, and other factors -- a final determination on length should be made after content is further determined.)

(The information from Part C of the PST Information and Needs Assessment Form will help you make this decision.)

5. **Where should the centralized portion of the PST be held?** Decide on an area so you can seek an appropriate facility. *(The material from Parts A and B of the PST Information and Needs Assessment Form will help you make this decision.)*
6. **Who will be responsible for designing and implementing the PST?** What organization(s) will be responsible for coordinating the PST -- including training design, logistics, and delivery? Who will serve on the design team? Who will be the key trainers? *(The information from Part E of the PST Information and Needs Assessment Form will help you make these decisions.)*
7. **What further information is needed before other decisions can be made about the PST?**

Decision Worksheet C: Scope of the PST

Once you have made key decisions and prioritized desired outcomes, try to set PST parameters more specifically. Answering these questions may require investigation of alternatives and costs, and you may want to set up subcommittees to take responsibility for specific tasks. You will want to make these decisions as soon as possible. Look carefully back at your *PST Information and Needs Assessment Form*, page 33, especially Parts A and B, to be sure you are adequately considering member characteristics and structural factors.

1. **What will be the exact length of the PST** -- including centralized and decentralized portions, if both are planned?
2. **When will the PST be held** -- what will be the exact dates?

3. **Will the PST be held at a residential facility, or will members go home at night?**

___ Residential ___ Day-time only

If the PST is at a residential facility: Will people who live within driving distance be allowed to commute, or will everyone stay at the facility?

4. **What will be the total number of people present,** including members, supervisors, trainers, and others?

5. **Will there be evening and weekend sessions?**

6. **Where will the PST be held** -- in what location, and at what facility?

7. **During what days will site supervisors, regional coordinators, and/or others besides members need to be present?**

LESSONS LEARNED: TRAINING SITE SELECTION

One major concern of AmeriCorps grantees is how to locate a training facility that meets PST needs and is affordable. Some ideas from current grantees:

- YMCA/YWCA conference or training centers
- 4-H conference centers
- Church-related retreat facilities
- State camp facilities
- Corporate training sites

For ideas, contact:

- Large nonprofit groups which have regular retreats
- Local or state agencies that hold frequent conferences and retreats
- Your state tourism office or convention bureau

8. **What will be the facility costs**, including meals, lodging, meeting rooms, equipment, and other facility costs? The transportation costs for members and others who attend?

9. **What special activities require early attention** -- a wilderness experience, community projects in nearby communities, etc.?

10. **When and how will you inform the members of the PST dates and expectations?**

11. **Develop a checklist of what special arrangements are needed and how will they be provided** -- such as:

- **Medical care** -- Ensuring access to medical services and a pharmacy
- **Disability access** -- Ensuring that all facilities and activities are accessible to members with disabilities (for example, the need for an alternative to a wilderness experience or modified activities if some members have disabilities that preclude their full participation)
- **Child care** -- If some members are single parents, is any help available or must they make their own child care arrangements? Will the program provide child care on-site or any reimbursement for child care at home? Can they bring their children if they provide child care themselves?
- **Family visits** -- Arranging when and how to allow members who live in the vicinity to visit their families or have families visit them
- **Transportation** -- Arranging transportation to and from the facility for members, to and from town for community projects, etc.

**LESSONS LEARNED:
TRANSPORTATION COSTS**

Transportation costs for getting members and host site personnel to PST can be substantial. One group offered incentives to host sites for arranging car pools and discounted plane tickets. They bought staff shirts for host site supervisors with some of the money they saved.

Decision Worksheet D: Training Responsibilities

Use this worksheet to decide how responsibility for PST design and delivery will be divided. Consider the information in the *PST Information and Needs Assessment Form*, page 33, especially Parts C and E.

1. **Responsibilities:** How will responsibility for training design be divided among the cooperating groups? How will the design effort be coordinated? Consider who will be responsible for development of an overall outline and framework as well as for specific units of training related to administrative information, affiliation with the AmeriCorps National Service Network and teambuilding, cross-cutting knowledge and skills, project-specific knowledge and skills, community projects, and other specific aspects of training? Who will design project-focused training units, if they are to be included in the centralized training?
2. **Consistent Training Format:** Who will oversee the development of a training format for everyone to use so that the training design will be complete and consistent?
3. **Delivery of Training:** How will responsibility for actual training "delivery" be divided among the cooperating groups? To what extent will staff be used? To what extent will community experts be asked to participate? Host site supervisors? Consultants?
4. **Use of Consultants:** If training consultants will be hired, who will hire them and what will be their role -- design and delivery of training, or a more limited role? How much money is available for consultants?
5. **Pre-Testing:** How will the PST design be tested -- will reviews and/or mock sessions be held?

PART #3: PREPARING A PST WORKPLAN

SCOPE: This activity helps you develop a workplan for developing your PST and making the best use of the time available before pre-service training begins, whether that is less than a month or more than three months.

WHO SHOULD PARTICIPATE: The PST design team or a subcommittee of the design team.

TIME REQUIRED: Several hours to develop and refine the workplan.

MATERIALS NEEDED: *Sample PST Workplan and Format* and blank *PST Workplan Format* (attached)
Easel pad, markers, and masking tape
Large calendar; use a calendar designed for water-soluble markers or bring post-it notes for use in writing down major activities and moving them around on the calendar

OBJECTIVE: To prepare and agree upon a workplan to guide design and delivery of the PST.

Hint: A checklist can help you ensure that no important PST planning task is overlooked. Try using the sample task list in the *Sample PST Workplan and Format* on the following page. For a detailed checklist of logistical arrangements, use the *Sample Logistical Arrangements Checklist* found in Chapter 5, page 219.

DIRECTIONS: Prepare the workplan after completing the worksheets and basic decision making described in Parts #1 and #2. One way to do the workplan is to have the entire PST design team or a subgroup meet and:

- Identify major tasks and activities and list them
- Use a calendar to set deadlines for these tasks

- Assign responsibilities for completion of each task
- Once it is completed, type the workplan, have it reviewed, and use it to guide all aspects of PST design and delivery
- Be sure to review progress against stated deadlines on a regular basis

Sample PST Workplan and Format

This workplan identifies sample tasks. Your workplan should reflect your unique program. You may already have secured funding for PST when you began the process, or funding may be approved after you have done some planning. You may want to specify more detailed activities under each task. A blank workplan format follows.

| Task | Deadline for Completion | Responsibility |
|---|-------------------------|----------------|
| Select PST design team, including AmeriCorps program and collaborating agency staff, current members, host supervisors, others as needed | | |
| Make basic decisions about PST, including budget | | |
| Agree on desired PST outcomes | | |
| Agree on length of centralized PST | | |
| Set dates for centralized PST | | |
| Arrange site for PST | | |
| Obtain member needs assessment information | | |
| Obtain host site input on PST content and emphasis (make arrangements for structured input if program is in many locations) | | |
| Agree on relative emphasis on administrative information, affiliation with the AmeriCorps National Service Network and teambuilding, general or cross-cutting knowledge and skills, and project-specific knowledge and skills | | |
| Agree on training content, including topics or units to be covered | | |
| Decide on all training responsibilities including use of program staff, consultants, and volunteers | | |
| Identify, screen, and select consultants as needed | | |
| Discuss and agree upon training philosophy and methods, such as experiential learning, cooperative learning groups | | |
| Agree on integrating themes for the PST -- such as appreciation for diversity, development of group skills | | |

| Task | Deadline for Completion | Responsibility |
|---|--------------------------------|-----------------------|
| Develop a standardized format for training units and obtain agreement to use it from all training design partners | | |
| Develop an overall training outline identifying major training units and order of presentation | | |
| Assign responsibility for developing specific training units and materials | | |
| Arrange community projects for centralized PST | | |
| Ensure arrangements to meet special needs -- transportation, medical services, child care | | |
| Review draft training units and make revisions as needed | | |
| Integrate units into a consistent training package with a detailed agenda and materials | | |
| Develop a PST evaluation plan and materials | | |
| Prepare portfolios for members if desired | | |
| Hold trainer training if needed | | |
| Hold mock training session to review the PST training plan/package | | |
| Revise training materials and change trainer assignments as needed | | |
| Ensure final logistical arrangements | | |
| Prepare training notebooks | | |
| Hold final preparation/orientation meeting for all involved | | |
| Begin PST | | |
| Hold nightly meetings to assess progress and make training revisions as needed | | |
| Do final evaluation | | |
| Hold debriefing for trainers, host site personnel | | |

PST Workplan Format

| Task | Deadline for Completion | Responsibility |
|------|-------------------------|----------------|
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