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

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

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**
✓ 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.	➢ May lead volunteers to become bored or confused. ➢ May overload volunteers with too much material at one time.

MANY SHORT SESSIONS	
Pros	**Cons**
✓ Allows volunteers to concentrate on a single issue. ✓ Promotes quick absorption of material and ideas.	➢ May seem to trivialize material. ➢ May cause vital issues to be overlooked because of time constraints.

✓ 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.	➢ Need trainers skilled in presenting material in a limited amount of time.

APPENDIX #12

Timeline for Producing a Training Event

TIME	ACTIVITY	RESOURCES
Month 1	❑ Assess needs and design Interviewing Skill Training. ❑ Identify co-trainers and target audience. ❑ Develop general agenda.	✓ Needs assessment survey for mail (or by phone) ✓ Staff to act as trainers or materials developers
Month 2	❑ Identify size & date. ❑ Develop & send out training notice. ❑ Identify/develop handouts and materials. ❑ Develop visuals and trainer's notes. ❑ Develop an evaluation form.	✓ Up-to-date mailing lists ✓ Model materials ✓ Model evaluations
Month 3	❑ Complete plans with co-trainers. ❑ Walk through the logistics. ❑ Conduct training event.	✓ Room (large group and breakout rooms) ✓ Flipcharts/videos ✓ Evaluations
Month 4	❑ Follow-up monitoring.	✓ Participant work plans

APPENDIX #13

5 D's Tip Sheet (Training Development Process)

DIRECTION	
1. Develop training purpose and goals. 2. Define desired training results as specific objectives and performance standards.	➢ Why are we conducting this training? ➢ What do we want to achieve? ➢ What do we want participants to know by the end?
DESIGN	
1. Assess participants' needs. 2. Decide what will take place and when. 3. Envision the flow of activities.	➢ 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?
DEVELOPMENT	
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.	➢ 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?
DELIVERY	
1. Present the training event.	➢ Did I explain the goals to the group? ➢ Are there any last minute changes?
DETERMINATION	
1. Follow up.	➢ 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					

SAMPLE

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?

   _____
   _____
   _____
   _____