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## Leadership Development Series

*Delivering Effective Presentations:*
A tool for outreach

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SOCIAL SECURITY ADMINISTRATION USA

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# DELIVERING EFFECTIVE PRESENTATIONS: A TOOL FOR OUTREACH

**Presentations and Training as a Tool for Outreach and Information Dissemination**

An important tool for the benefits specialist is that of conducting presentations and doing training. These can be a mechanism by which a benefits specialist accomplishes many ends:

- Increases a community's general knowledge level regarding benefits and their impact on work;
- Targets a particular weakness or problem area and enhances it;
- Provides information across an array of stakeholders with common interests and information needs;
- Increases community visibility; and,
- Meets informational needs of customers.

**Suggestions Regarding Outreach and Training**

As project begins to plan and implement outreach activities, the following suggestions regarding providing presentations to groups as an outreach strategy may be helpful to consider:

It is important to distinguish between short presentations that a project might introduce services and supports available from training events that are designed to share content information about Social Security and the work incentives.

1. Short presentations to acquaint the community with Benefits Planning Assistance and Outreach (BPA&O) service could start right away, and is a very appropriate activity for benefits specialists who feel equipped to do so. It is helpful to have some of the SSA's materials available to distribute (ie Red Books, etc.) and project flyers, fact sheets or brochures developed (make sure to get these approved by SSA). However, the main purpose of this type of presentation is to increase the interest of stakeholders regarding the fact that there are many work incentives and that if they need help learning about them or doing individual planning, it is available. If specific questions regarding content emerge (which they almost always do) and the timeframes of the presentation do not allow for addressing content adequately, these questions can often be fielded by offering to follow-up after the session or by making an appointment to discuss the question with the person.

2. Workshops that are designed to teach participants about the work incentives require much more time and expertise to accomplish with quality. Therefore, it is recommended that this be prepared for and planned carefully. Regional training center personnel (e.g. Cornell University's Program on Employment and Disability, University of Missouri's Regional Continuing Education Program and Virginia Commonwealth University's

Rehabilitation Research and Training Center) can help you with getting access to some training materials and give you input regarding how to structure a training event.

However, we recommend that new staff provide benefits planning for at least 6 months (if full time; 1 year, if part time) before taking lead on a training event. Ample opportunity to use this information after learning is a critical prerequisite to providing group training on this topic. Then, when new staff has this experience, the next step is to assess skill/affinity for doing group presentation (this can be assessed based on provision of the short presentations discussed above). If staff needs support in how to do training effectively, Regional Training Centers can offer support. Based on need, these Centers may be able to conduct a Train-the-Trainer workshop for project staff and others nearby. It is also recommended that new trainers conduct their first couple of events with a mentor and receive feedback afterwards.

**Identifying Need for Training**

An important first step in designing training experiences for customers is understanding the unique needs that may be present. This happens on two levels--generally to identify global needs that may exist within a targeted group or community as a whole, as well as identifying specific training and informational needs within that more global area. Both situations may require very different needs assessment approaches. A general needs assessment will identify: who needs training; what the needs for information are; and the number of people needing training. A specific need assessment will identify: content of program; training delivery formats and process; and desired outcomes.

There are several methods for collecting training needs information:

- Informal telephone surveys (general inquiry)
- Quantitative telephone surveys (interview-based)
- Open-ended questions in a mail survey
- Quantitative research-based mail survey with closed-ended questions, ranking, or scales

Sample needs assessment instruments have been provided in Appendix A.

If someone or a specific agency requests training support you are probably not going to conduct a formal needs assessment. However, you should try and further qualify and quantify the problems or needs at hand by talking to several individuals that cut across the problem areas at different levels. (e.g., individuals with disabilities, their family members, administrators and managers, and direct line workers.)

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| **Time Delivery** | Timing training to match the receptivity of the audience is a luxury few trainers are granted. Work incentives instruction is frequently sought right after a crisis—usually when a person with a disability is in jeopardy of losing their benefits. Needs assessment solicited at this time will often be laden with emotion and may not reflect the true informational needs of a person or agency.

Be sensitive to the fact that, on occasion, you may need to differentiate between crisis need and real need for information. Both are important, however, it is easy to "miss the forest through the trees" or in other words, not really get to the root cause or need for information. |
| **Recruiting Training Participants** | The effective benefits specialist is well networked in their community and maintains a database of important stakeholders. When recruiting participants for a training program don't overlook your primary customers. This may also provide an excellent opportunity to expand your network. Make sure your mailing lists and network include:

- Other community consortia (Chambers of Commerce, Workforce Investment Board, etc.)
- Constituency organizations (CRPs, ILCs, etc.)
- State agency representatives
- State and local government representatives
- Disability groups and associations
- Parent groups and associations
- Trade associations (rehab association, supported employment association, human resource association, etc.) |
| **Marketing Training Programs** | Marketing a training program involves several important steps and collaboration to maximize existing resources while minimizing associated costs.

***Timing***

Make sure to time your brochure so that it lands on a customer's desk at least 8-12 weeks prior to the event. Even earlier for large programs or events in which you are targeting individuals with tight schedules. The more preparation time people have, the more likely they will integrate your event into their schedule.

***Brochure Design***

Design your brochure in a style and format that will be catching to the customer being targeted. A brochure doesn't need to use offset multi-colored printing. In fact, many have generated one-page flyers with equal appeal using a high quality photocopier and a high quality paper. |

*Brochure Content*

Make sure to include several important pieces of information within the content of your brochure: date, time and location; an agenda and course description; target audience; names and qualification of course instructors; registration information with accompanying form with accommodation request; and collaborating or sponsoring agency information.

*Mailing Alternatives*

Advertisement and recruitment can be costly. It is important to explore other options which may not have costs associated or opportunities to waive potential registration fees for recruitment assistance. Professional association and agency newsletters may provide this vehicle as well as list serves, electronic bulletin boards and other digital mediums.

**Developing Your Program and Identifying Instructors**

The success of any program hinges on the development of a quality agenda and accompanying instructional design and informational materials. Prior to developing an agenda, informational materials and identifying instructional design, a comprehensive listing of learning objectives must be established—the core context upon which the program will be built.

*Learning Objectives*

Learning objectives are based on information gathered during the needs assessment portion of program development. Reviewing highest ranked needs, translate them into specific objectives. For example, if trial work period were identified as a training need your learning objective might be "to help participants understand the complexities of the trial work period and implications of earnings beyond the accumulated nine month period." Once learning objectives have been identified, a sequence for how the objectives should be taught can be developed. This leads to development of the agenda.

*Agenda*

From your ranked learning objectives begin to identify time requirements needed to provide adequate instruction to support the objective. Remember adult learners are good for about 1.5—2 hours before they need a break. Base the length of your break on number of individuals needing to use restrooms, locations of restrooms and availability and location of refreshments. For full day programs make sure to allow an hour for lunch and more if participants need to travel off site for accommodations.

These are some steps to consider when developing your agenda:
- Identify the general themes and topics.
- Arrange the themes and topics in a logical sequence.

- Create an agenda. Illustrating it in a flowchart format is sometimes helpful to identify all the various components, which should be covered, and to ensure a logical progression of topics.
- Outline the modules and titles and define each of the components.

*Instructors*

Once an agenda is completed the need for specific instructors should become more evident. Even if you have the expertise to conduct the program, depending on length of time, you may want to secure additional instructors-especially if you want representation from co-sponsoring agencies such as SSA. Keep in mind; certain well-established instructors may have instant rapport and credibility with a group you are pitching toward. Securing an outside instructor may prove beneficial in recruiting additional participation.

**Putting it Together**

A good instructor respects the clock by narrowing down or adjusting her/his lecture to suit the time available. S/he knows that it is better to have an audience still interested and uninterested after a talk that has been unnecessarily long. S/he also knows that a "sag point" in the audience's interest occurs after about twenty minutes, and s/he plans her/his talk and her/his delivery so that interest is reawakened and passive listeners are reactivated from time to time, by the use of interesting examples, humor, rhetorical questions, audience participation through discussion or question period, etc.

Having set yourself a general title, that you can make more precise later on, and bearing in mind your objective; mark down a few basic headings under which you can list ideas. Do not worry about order at this point; the first step is simply to gather material together. Jot down everything you think you want to cover, consulting reference books and texts or previous lecture notes if necessary. Note down illustrative examples, anecdotes (as long as they are relevant) and quotes. Look up facts and figures. You may also think of ideas for discussion or quiz questions, for student exercises, or for visual aids, and these should be recorded alongside the points they will support.

After you have collected enough raw materials, the next step is to sort it into "must say," "should say" and "could say" categories. What do you want the audience to remember at the end of the lecture? Put your emphasis on this and narrow down you subject accordingly, also bearing in mind the time available.

There is plenty of evidence to show that people generally remember a greater percentage of a short talk than of a long one. If you try to cover too much ground you will only confuse your audience. Do a little well, rather than a lot badly. Remember the iceberg. Only about one-seventh of its total mass is visible above the surface of the water. So it is with the lecture. Only a part of the total mass of information at your disposal may "rise above the surface" in the lecture room. But the rest as in the case of the iceberg just as truly supports this visible part.

At this point you are ready to reorganize your notes into logical order and work out a more detailed outline, using the following basic structure.

1. The **introduction**, which should be brief and to the point, presents the theme and objective of the talk in a manner designed to arouse the interest and curiosity of the audience right from the start. Opening remarks need to be planned and rehearsed with some care, as it is very largely that first impression which will motivate the audience to go on listening or to "switch off." Above all, try to avoid beginning with an apology. It is seldom necessary or relevant and it will not really help you to achieve your objective.

2. In the **body** of the talk, the main theme is developed in logical steps so that the most important points will be remembered. One step should quite naturally stem from the previous one so that the listeners are carried forward. Add illustrative examples, related to the audience's experience where possible, anecdotes, and instructive demonstrations to substantiate the points being made. Use visual aids to help the audience understand and remember what is important. Put these up sequentially, as each new point is raised. You may also want to allow time for questions and discussion to clarify meanings. Keep an eye on the time so that audience participation does not prevent you from returning to your main points.

3. The type of **conclusion** you use will depend largely upon your objective, but at least give a brief recapitulation, in different words, of your main points (this is made easier when a visual display has been developed throughout the talk), plus some indication of "where do we go from here?" The quality of your conclusion may determine whether you achieve your over-all objective or not. For this reason, many speakers learn their conclusions by heart.

**Calculating Costs for Training**

Estimating how much a training program will cost to implement may help you decide whether or not to charge a registration fee or secure outside sponsorship. This will also help in calculating your training budget and areas where you may need to cut back. A form to assist you in calculating training costs is provided in Appendix B.

Keep in mind when projecting costs that you will need to consider regrouping your own personnel costs associated with arranging and conducting the training, including:

- Coordinating the training
- Conducting needs assessment
- Arranging facilities and accommodations
- Designing and reproducing materials
- Conducting program evaluation

Keep in mind if you are charging a registration rate and cosponsoring the program you should have a formal agreement regarding matters of cost and profit sharing.

**Training Site Coordination**

Second only to quality program design is accessibility and comfort of the training location selected. To assist you in ensuring the accessibility of your training location use the ADA accessibility guidelines produced by the Equal Employment Opportunity Commission, U.S. Department of Labor found in Appendix B of the *Americans with Disabilities Act Handbook*. Copies of this information can be requested from your regional Disability and Technical Assistance Center (DBTAC). A directory of contact information follows:

*Region 1 (CT, ME, MA, NH, RI, VT)*
    *New England DBTAC*
    Adaptive Environments Center, Inc.
    374 Congress Street, Suite 301
    Boston, MA 02210
    (617) 695-0085 (V/TTY)
    (617) 482-8099 (Fax)
    adaptive@adaptenv.org.
    http://www.adaptenv.org.

*Region 2 (NJ, NY, PR, VI)*
    *Northeast DBTAC*
    United Cerebral Palsy Associations of New Jersey
    354 South Broad Street
    Trenton, NJ 08608
    (609) 392-4004 (V)
    (609) 392-7044 (TTY)
    (609) 392-3505 (Fax)
    dbtac@ucpanj.org.
    http://www.disabilityact.com.

*Region 3 (DE, DC, MD, PA, VA, WV)*
    *Mid-Atlantic DBTAC*
    TransCen, Inc.
    451 Hungerford Drive, Suite 607
    Rockville, MD 20850
    (301) 217-0124 (V/TTY)
    (301) 217-0754 (Fax)
    adainfo@transcen.org.
    http://www.adainfo.org.
    (573) 884-4925 (Fax)
    adalh@showme.missouri.edu.
    http://www.adaproject.org.

*Region 4 (AL, FL, GA, KY, NC, SC, MS, TN)*
    *Southeast DBTAC*
    United Cerebral Palsy Association, Inc.
    Center for Rehabilitation Technology at Georgia Tech
    490 Tenth Street
    Atlanta, GA 30318
    (404) 385-0636 (V/TTY)
    (404) 385-0641 (Fax)
    se-dbtac@mindspring.com.
    http://www.sedbtac.org.

*Region 5 (IL, IN, MI, MN, OH, WI)*
    *Great Lakes DBTAC*
    University of Illinois/Chicago
    Department on Disability & Human Development
    1640 West Roosevelt Road
    Chicago, IL 60608
    (312) 413-1407 (V/TTY)
    (312) 413-1856 (Fax)
    gldbtac@uic.edu.
    http://www.adagreatlakes.org.

*Region 6 (AR, LA, NM, OK, TX).*
    *Southwest DBTAC*
    Independent Living Research Utilization
    2323 South Shepherd Boulevard, Suite 1000
    Houston, TX 77019
    (713) 520-0232 (V/TTY)
    (713) 520-5785 (Fax)
    ilru@ilru.org.
    http://www.ilru.org/dbtac.

*Region 7 (IA, KS, MO, NE)*
    *Great Plains DBTAC*
    ADA Project
    100 Corporate Lake Drive
    Columbia, MO 65203
    (573) 882-3600 (V/TTY)
    (573) 884-4925 (Fax)
    adalh@showme.missouri.edu.
    http://www.adaproject.org.

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*Region 8 (CO, MT, ND, SD, UT, WY)*
　　*Rocky Mountain DBTAC*
　　Meeting the Challenge, Inc.
　　3630 Sinton Road, Suite 103
　　Colorado Springs, CO 80907
　　(719) 444-0268 (V/TTY)
　　(719) 444-0269 (Fax)
　　ada-infonet@mtc-inc.com.
　　http://www.ada-infonet.org.

*Region 9 (AZ, CA, HI, NV, Pacific Basin)*
　　*Pacific DBTAC*
　　California Public Health Institute
　　2168 Shattuck Avenue, Suite 301
　　Berkeley, CA 94704-1307
　　(510) 848-2980 (V)
　　(510) 848-1840 (TTY)
　　(510) 848-1981 (Fax)
　　adatech@pdbtac.com.
　　http://www.pacdbtac.org.

*Region 10 (AK, ID, OR, WA).*
　　*Northwest DBTAC*
　　Washington State Governor's Committee
　　　on Disability Issues & Employment
　　P.O. Box 9046, MS 6000
　　Olympia, WA 98507-9046
　　(360) 438-4116 (V/TTY)
　　(360) 438-3208 (Fax)
　　dcolley@esd.wa.gov.
　　http://www.wata.org/NWD.

In addition, you may want to check with your local independent living center or regional DBTAC for information regarding accessible hotels or training locations.  A Guide to Planning Conference Accommodations for Persons with Disabilities: Conferences, Trainings, Meetings, Materials is provided in Appendix C.

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*Pre-registration and Coordination*
- Accessible registration directions (i.e. TTY)
- Registration brochure in accessible formats
- Orientation toward customer service
- Identify track record of interpreters and secure references
- Provide training materials to interpreters prior to the training
- Make sure assistive listening devices have sufficient batteries and are fresh
- Double check specific accommodation requests to ensure adequacy

*Lodging and Transportation*
- Accessible lodging. It is important to note that in most cases you may want participants to make their own lodging accommodation requests putting the onus on the hotel for providing lodging accommodations requested.
- Accessible transportation to and from the training site from the hotel if lodging is required
- Provide accessible transportation information with training confirmation letters outlining potential resources from train stations and airports which individuals may be coming in to

*During the Training*
- Directions for instructors to describe in detail visual information provided
- Limited distribution of pass-outs from instructors if not available in alternative formats
- Effective use of interpreters and sensitivity to rate of speech
- Use of assistive listening devices if appropriate
- Reiteration of questions from the audience so that all can benefit
- Having participants state their name when asking questions or providing comment
- Lighting and seat arrangement for interpreters
- Adequate aisle and desk space
- Arrangement of seating to allow for some seating to be in low distraction / traffic area

**Designing Supplemental Training Materials**

Quality materials are an important element of any training program. While instruction provided may lapse in memory prior to a participant's return home, information and resources provided will serve as a useful tool later on. Providing reference tools is important. Keep in mind, reference tools are not just the participant training manual but may also include other materials such as articles, informational brochures, web page references, bibliographies, and other quick reference guides.

A good rule to follow is to make sure that, for every learning objective designed, participants have some sort of resource they can take home with them for future reference.  While often we rely on a training manual for this, it can also be successfully accomplished using some of the suggestions given above.

As you package your materials together keep in mind accessibility and usability of information provided.  If developing corresponding overheads and transparencies make sure to include on them a reference to where in materials you have provided participants they can access the information.  This allows the learner to not just hear and see the information but also to find and get a feel for it—covering the entire primary learning modes.

## Evaluating Your Outcomes

Evaluation is a final important component of an effective training program.  It seeks to measure the extent or other learning that occurred as a result of instruction provided as well as environmental variables.  When designing an evaluation instrument you may want to consider collecting data regarding:

- Appropriateness of content depth
- Appropriateness of training duration
- Applicability of content to profession and practice
- Accuracy of content
- Sequencing and timing of content
- Usability of materials provided
- Extent to which knowledge gained will be used
- Identification of specific skills acquired as a result of the training
- Instructor presentation skills
- Use of multiple teaching modalities
- Instructor content knowledge
- Instructor rapport with group
- Instructor flexibility
- Instructor innovation
- Location of training facilities
- Comfort of training facilities
- Accessibility
- Quality of food / breaks provided
- Suggestions for program improvement
- Finest aspects of the program

Evaluation should take place both immediately and if opportunity is available following the training at some interval. Follow up evaluation may seek information specifically related to the extent to which the individual is using the information now that they have returned to their job or home and provide opportunity for further needs assessment.

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Make sure to complete a summary of program evaluation data collected and provide to both the instructors and any co-sponsors associated with the program. This information will be invaluable in fine-tuning future presentations and programs. Some sample instruments are provided in Appendix D. Also a Training Coordination Plan, Training Coordination Checklist and Training Accommodations Survey have been provided in Appendix E.

**Moving from Training Coordination to Being an Effective Trainer**

While training is only one of many tools in the benefits specialist's toolkit, it is an important one. Participant responses to your training programs will be diverse. Public speaking is a core skill and one that plays an important role in training. If you have limited experience in this area you may want to consider joining a local Toastmasters club or searching to see if a local trainers coalition exists that you could join.

It is strongly recommended that if training has not been conducted before that you have others evaluate your training style and delivery prior to engaging a large group. This could take several forms. First, you might consider doing a formal in-service program in your agency or with a group of colleagues. Make sure to have them evaluate your performance and provide tips for enhancing your skills. Another approach might be to identify a master trainer that you respect and enjoy. Explore their willingness to mentor you and provide some onsite guidance when you conduct training. This may require you to do some intense evaluation of how that trainer operates as well. Finally, videotape doesn't lie. Set up a bunch of stuffed animals at home or indulge your family and ask them to serve as a "pretend audience". Select a short, specific topic for delivery and videotape yourself. Watch the videotape and self-critique or watch it with those in attendance and ask them to provide editorial comment as the tape is playing. Feel free to stop the tape at any point for discussion.

**Delivering Effective Training**

As complex human beings, we bring to the learning environment a combined set of emotional, physical, mental, and social characteristics that make each one of us unique. The way to approach diversity in learners and to accommodate diverse learning styles is with variety in instructional pedagogy. To do this the instructor must first understand the specific information needs of people in attendance, the sequence in which they need it and what form the information and instruction will take to maximize learning. A master trainer:

- uses verbiage easily understood and speaks with clarity using good inflection and tone
- knows their content area
- bases much of their training on personal experiences to enrich the learning experience
- uses multiple teaching modes and balances their use to maintain participant attention
- will accommodate training delivery as requested and needed
- has technical skill in using advanced audio-visual technology
- understands the diversity of learning styles of participants in the training

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|  | • establishes a learning contract early on in the training with participants to gauge what they specifically want to leave having learned beyond general content referenced in the brochure |
|  | • is skillful in engaging participants in discussion |
|  | • is skilled at closing down discussion |
|  | • is not condescending and is accessible to learners |
|  | • promotes sharing and networking among participants |
|  | • recognizes and respects skills and expertise participants bring to the learning environment |
|  | • can monitor and self-pace instruction |
|  | • creates a learning environment that is safe and secure to allow for sharing of ideas and personal beliefs and experiences |

**Using a Flipchart**

Using a Flipchart is an important tool in the trainer's tool belt. However, to keep it effective, remember:
- Make it readable! Write big enough (at least ½" high and two spaces between lines).
- Leave bottom 1/4 - 1/3 blank.
- Use multiple colors (excluding yellow).
- Use underlining and boxing for key words.
- Have tape available to put completed ones on the wall.
- Do not keep your back turned from the audience for too long.
- Do not use with large audiences that will not be able to see.
- Make sure to read and describe everything you put down on the flipchart to ensure accessibility of materials.

**Using A/V Effectively**

Follow these steps to assure efficacy of your audio/visuals:
- Focus and position equipment before starting – make sure visuals are clean, crisp and focused!
- Watch lighting of room (dimmed enough to see screen well, but light enough for notes and safety – Keep in mind use of interpreters and individuals who read lips.)
- Recheck position for each overhead/slide.
- Do not walk or stand in front of the screen.
- Do not look at the screen while talking. If you need notes – copy and carry with you.
- Do not move through too quickly in case audience is taking notes (or provide them copies of overheads as handouts).
- Turn off the projector for longer discussions about a topic if it is noisy or distracting (if not, leave on).
- Use big enough fonts (20+).
- Use color if available.
- Spellcheck/edit before use.
- Do not have words/images too close to bottom.

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| **9 Simple Rules of Learning** | • When an overhead/slide includes a list, move it down instead of revealing all at once.<br>• Again, remember to read and describe everything on the visuals being used to ensure accessibility of information.<br><br>1. The capacities of learners are important in determining what can be learned and how long it will take. The implication of this principle is that trainers should know their audiences. Bright people can grasp a complex message that is over the heads of the less bright ones. And they grasp significance of a simple message in less time.<br><br>2. The order of presentation of materials to be learned is very important. Points presented at the beginning and end of the message are remembered better than those in the middle. Thus, if four reasons "why" are given in a series, the two most important points should be given first and last.<br><br>3. Showing errors in how to do something can lead to increases in learning. Accordingly, the continuing repetition of the training message is desirable. It usually takes a lot of repetition in the early weeks of a program to overcome rapid forgetting.<br><br>4. Repetition of identical materials is often as effective in getting things remembered as repeating the same story but with variations. Psychologists term this identical vs. varied repetition. Using training films, they have failed to find significant differences in learning, after employing a lot of different examples versus repeating the same few.<br><br>5. Knowledge of results leads to increases in learning. If you are interested in teaching a given amount of material to people, knowledge of how well they are doing as they are learning leads to greater learning gains.<br><br>6. Learning is aided by active practice rather than passive reception. This point is of great importance. If you can get your audience members to "participate" in your presentation, they are much more likely to remember your points.<br><br>7. A message is more easily learned and accepted if it does not interfere with earlier habits. Thus, a training theme that draws on prior experiences of the audience will help the learning of the message.<br><br>8. The mere repetition of a situation does not necessarily lead to learning. Two things are necessary "belongingness" and satisfaction." |

Belongingness means that the elements to be learned must seem to belong together, must show some form of relationship or sequence. Satisfiers are real or symbolic rewards, as distinguished from annoying consequences that may be present in the learning process.

9.  Learning something new can interfere with the remembering of something learned earlier. This is most important when the learner is being asked to change her/his habits or methods of work. For example, if you study French for an hour and then study Italian for an hour, your ability to recall the French will probably be less than it would have been had you substituted an hour's interval of rest in place of the hour's study of Italian.

**A Brief Guide to Teaching and Training Methods**

| What It Is | What It Will Achieve | Points to Watch |
|---|---|---|
| **Lecture**<br><br>A talk given without much, if any, participation in the form of questions or discussion on the part of trainees. | Suitable for large audiences where active engagement of the participant is not possible because of numbers. The information to be put over can be exactly worked out beforehand   even to the precise word. The timing can be accurately worked out. | The lack of participation on the part of the audience means that unless the whole of it, from beginning to end, is fully understood and assimilated the sense will be lost.<br><br>Limited value in promoting behavioral or attitudinal changes.<br><br>Unsuited for teaching of skills that require practice. |

| What It Is | What It Will Achieve | Points to Watch |
|---|---|---|
| **Discussion**<br><br>Knowledge, ideas and opinions on a particular subject are freely exchanged among trainees and the instructor. | Suitable where the applications of information is a matter of opinion. Also when attitudes need to be induced or changed. Trainees are more likely to change attitudes after discussion than they would if they were told during a talk that their attitude should be changed. Also suitable as a means of obtaining feedback to the instructor about the instructor about the way in which trainees may apply the knowledge learned. | The trainees may stray from the subject matter or fail to discuss it usefully. The whole session may be blurred and woolly. Trainees may become entrenched about their attitudes rather than be prepared to change them. |
| **Role Play**<br><br>Trainees are asked to enact, in the training situation, the role they will be called upon to play in their job of work. Used mainly for the practice of dealing with face-to-face situations (i.e. where people come together in the work situation). | Suitable where the subject is one where near-to-life practices in the training situation is helpful to the trainees. The trainees can practice and receive expert advice or criticism and opinions of their colleagues in a "protected" training situation. This gives confidence as well as offering guidelines. The trainees get the feel of the pressures of the real life situation. | Trainees may be embarrassed and their confidence sapped rather than built up. It can also be regarded as a "bit of lark" and not taken seriously. |

| What It Is | What It Will Achieve | Points to Watch |
|---|---|---|
| **Case Study**<br><br>A history of some event or set of circumstances, with the relevant details, is examined by the trainees. Case studies fall into two broad categories:<br>a.  Those in which the trainees diagnose the causes of a particular problem.<br>b.  Those in which the trainees set out to solve a particular problem. | Suitable where an objective look at the problem or set of circum-stances, free from the pressures of the actual event, is beneficial. It provides opportunities for exchange of ideas and consideration of possible solutions to problems the trainees will face in the work situation. | Trainees may get the wrong impression of the real work situation. They may fail to realize that decisions taken in the training situation are different from those that have to be made on the spot in a live situation. |
| **Exercise**<br><br>Trainees are asked to undertake a particular task, leading to a required result, following lines laid down by the trainers. It is usually a practice or a test of knowledge put over prior to the exercise.<br><br>Exercises may be used to discover trainees' existing knowledge or ideas before further information or new ideas are introduced.<br><br>Exercises may be posed for individuals or for groups. | Suitable for any situation where the trainees need to practice following a particular patter or formula to reach a required objective. The trainees are to some extent "on their own." This is a highly active form of learning. Exercises are frequently used instead of formal tests to find out how much the participant has assimilated. There is a lot of scope in this method for the imaginative trainer. | The exercise must be realistic and the expected result reasonably attainable by all trainees or the trainees will lose confidence and experience frustration. |

| What It Is | What It Will Achieve | Points to Watch |
|---|---|---|
| **Application Project**<br><br>Similar to an exercise but giving the participant much greater opportunity for the display of initiative and creative ideas. The trainer lays down the particular task but the lines to be followed to achieve the objectives are left to the participant to decide.<br><br>Like exercises, projects may be set for either individuals or groups. | Suitable where initiative and creativity need stimulating or testing.<br><br>Projects provide feedback on a range of personal qualities of trainees as well as their range of knowledge and attitude on the job.<br><br>Like exercises, projects may be used instead of formal tests.<br><br>Again there is a lot of scope for the imaginative trainer. | |

**Preparing for Instruction**

The lecturer has many means for presenting these teaching aids. They may be distributed to the audience before, during or after the lecture. They may be displayed on racks or tables in the room. They may be projected as slides, filmstrips, or films.

These training aids are double-edged tools that can cut both ways. They can gain the attention of the audience and help to provide information. But, unless they have been carefully selected and designed to support the lecture, they can actually distract attention from the points that the lecturer is trying to make. It might be better to use no aids than to work with the wrong ones.

**Rehearse.** Rehearsing the lecture is an essential step, even for most experienced lecturers. If a rehearsal audience can be recruited, the speaker has an opportunity to check her/his speech and her/his delivery of it. This may reveal points at which s/he is unintentionally unclear, transitions that are made too abruptly for her/his listeners to follow, and other errors that can creep into even the best planned lecture. Since the lecturer knows clearly what s/he means to say, s/he may be the worst judge of whether or not s/he has clearly said it.

Try out your visual aids, finalizing plans for their arrangement, ensuring that they are readable and clearly visible in the training room.

The chief value of the rehearsal is in familiarizing the speaker with her/his speech. Even experienced lecturers suffer from stage fright on occasions. One or two dry runs through a lecture can build a speaker's confidence in her/himself and in her/his material.

**Delivering the Lecture (Points about Speaking)**

The written word can only be of limited help when it comes to advice on speaking technique. What is needed is practice followed by constructive criticism. Some of the essential points to keep in mind are set forth below.

**Setting the scene.** Make sure that you arrive at the appointed place a few minutes ahead of time so that you can check the physical arrangements, which have been made for you, such as layout of the chairs and tables, lectern, teaching aids, provision of chalk and eraser. Try out any unfamiliar pieces of equipment you intend to use. You may also use the time to talk with the coordinator and size up your audience if you haven't met them before.

**Covering the material.** Start punctually. Speak from your notes if necessary but do not put your nose into them; read a phrase, pause and look at the audience. If you get lost, stop, consult your notes without "flapping" and carry on. In any case, do not read your entire lecture or you will have no audience left by the time you finish.

Leave time for questions at the end. If you have more than one main point it may help to pause at the end of each one for questions. If you don't know the answer to a question then say so without hesitation and without embarrassment. Ask if anyone in the audience knows the answer; if not, suggest where they may be able to find it, or offer to find out yourself.

Finish on time. When the scheduled closing time comes, if some people are still asking questions and seem to want to go on doing so, get the coordinator to close the meeting formally. Those who wish to go may then leave and the others may stay and continue the discussion.

**Posture.** If you have a choice, speak from a position that is comfortable for you but appropriate to the situation. The main advantage of standing is that everyone can see you; it is also the convenient position from which to manipulate most visual aids. However, with a small group seated around a conference table, the informality of sitting may be desirable. Some speakers prefer to use a lectern because it holds notes at standing height.

**Appearance.** Have a look in the mirror. Speakers should make sure that there is nothing about their personal appearance which is out of harmony with the occasion or which is likely to irritate the audience or distract their attention. Clothes should be neat and suitable for the occasion. One should look confident and friendly (even if nervous), as audiences are very susceptible to first impressions.

**Manner.** Be poised. Any kind of leadership   talking before a group, organizing a discussion   requires a certain confidence and dignity to gain and hold the attention of the group.

Be courteous. Careless choice of language or humor or a thoughtless gesture may create barriers to communication, which will be difficult to overcome later.

Be sincere. Audiences are quick to judge speakers -they are not misled by cleverness and they don't like insincerity. Say what you mean and say it as if you mean it. Be yourself – don't try to imitate anyone else. Be enthusiastic, let your talk reveal and convince the audience of your own interest in the subject.

Establish eye contact with your audience. A speaker who is continually looking out of the window or down at her/his notes or visual aids is not doing her/his share in the communication process. Speak to all the audience and not just to the front row; if it is a large audience look first at one part and then at another. Don't fix on one particular person or group of persons; you end up ignoring the others.

**Gesture.** Any actions and gestures must be natural and spontaneous; if they are forced then it is best to do without them. They should also be purposeful and not just a flapping of the hands. Mannerisms   jiggling coins, playing with the chalk, walking about the platform for no apparent reason   should be avoided, as they are distracting and sometimes extremely annoying. Get your weight evenly distributed on both feet and then anchor yourself. Try to avoid leaning on the table or the lectern or putting your hands in your pockets.

**Voice.**  The tone of the voice can be altered to convey confidence, emotion, emphasis and indignation. Pace and volume should be varied occasionally to avoid monotony. Some people, probably due to nervousness, do lose some of their normal expressiveness when they are in front of a group. With a little conscious effort, this can be corrected. Rehearsal helps; it takes away some of the strangeness and novelty of the actual lecture.

Speech should follow the rate of thought so that the audience may reflect upon your remarks. Don't be afraid of pauses and silences   they can be very effective if employed to emphasize, to create suspense for what is to follow, to allow an idea to sink in or to mark a question. Don't race   it is always better to speak slowly than to speak too quickly.

Remember that you are inviting the audience to listen to you. Speak to them as individuals and throw your voice to the back row so that all can hear. This does not mean that you must shout.

**Vocabulary.**  It is best to use everyday language, avoiding slang, which could be misunderstood, preferring short, familiar words and keeping sentences short.

Be very careful with "funny" stories   especially if you are not a born storyteller, or if the audience is unknown to you. Choose stories that are relevant to the point you are trying to make.

**Communication Effectively Using Interpreters**

The presence of an interpreter does not guarantee clear communication.  As a user of interpreter services, there are some things you can do to make the interpreter situation more comfortable.  These hints will help you avoid inadvertently engaging in behaviors that block communication through an interpreter.

- Before the conference, meet your interpreters and provide them with any materials, including outline, notes, overhead transparency copies, and vocabulary lists.  Review the presentation at this time; the interpreters can become accustomed to your signing or speaking styles.  If you are able to use both signs and speech, it is usually better to select one consistent way to communicate for your presentation.

- If the program is longer than 1 ½ hours, two interpreters will be needed to work on a rotating basis.  Since interpreting is very hard work and deaf people need "eye breaks" (staring at one person for hours on end is fatiguing!), scheduling breaks for every other hour also helps.

- Good lighting is necessary for the deaf person to see the interpreter.  Make sure lighting is adequate before the conference begins.

- Have communication tools handy (paper and pen, diagrams, graphics— near the interpreter).

- Introduce the interpreters to the audience so the audience will be aware who will be interpreting for them.

- The interpreter should be located next to the speaker, so the audience can see both people.  If in a group discussion, the interpreter should be opposite the deaf person and should be in a position to indicate who is speaking.

- Keep eye contact with the audience, but do make some contact with the interpreters to check how things are going.  Address the deaf person directly. (e.g., "How do you feel?" *not* "Ask him how he feels.")

- Ensure that the audience can see the interpreter at all times.  While giving your presentation, avoid walking in front of the interpreter.  Also, avoid visual distractions, such as attempting to lecture while passing out handouts.

- Speak clearly in normal tones and at a normal pace.

- Interpreters are often a few words behind the speaker and the speaker should pause often to allow the interpreter to catch up. Allow time for the interpreter to finish signing your message and/or voicing the deaf person's message to ask questions.

- Pay attention to signals that a participant who is deaf-blind wishes to communicate.

- Allow time for a short pause in the presentation every quarter-hour to enable tactile sign interpreters to switch with an alternate interpreter. Tactile signing is fatiguing; therefore, more than one interpreter is needed for long presentations.

*When Participants are Blind or Visually Impaired:*

- Be specific about the meaning of terms, such as "over there," which are difficulty to grasp without visual references.

- Describe the visual surroundings in the workshop environment. Be clear about providing a point of orientation for the workshop room, e.g., the door or the podium, and describe items by their function, e.g. the small-group discussion area.

- Accompany communication expressed using body gestures with verbal communication; e.g., if you gesture" yes," also say the word "yes."

- Feel comfortable using words related to vision or blindness in conversations or presentations. People who are blind or visually impaired realize that others see, and use these verbal references themselves when they speak.

- Offer to guide a person who is blind or visually impaired to tactually explore items related to the presentation. Respect the individual's wish about how to carry out tactile exploration.

- Provide full, clear verbal descriptions of visual instructional materials; e.g., slides, overheads, or videos.
    - Verbally express the exact content of information that is written on a chalkboard or flip chart as it is written.
    - Verbally describe graphics that are used to illustrate a presentation, as the visual material is displayed.
    - Read aloud the text of notes displayed on overheads, slides, and videos.

- Indicate verbally when one section of a presentation or workshop ends and a new section begins; e.g., "Now we will move on to the second topic…"

- Ask group participants to quickly give their name as they address the group until it is clear that participants who are blind or visually impaired recognize the others in the group; e.g., "This is Sally. I'd like to add this to the discussion…"

- Provide periodic verbal summary overviews of print information that is displayed for the audience to use throughout a presentation.

- Keep a slate, stylus, and index cards to jot down ideas that come to mind or to note comments from participants.

- Designate a sighted aide to record written notes on a flip chart for use by the audience. Prepare in advance of the presentation the manner in which you will communicate your requests for note taking during the workshop.

A guide to basic terms and concepts related to blindness and visual impairment is provided in Appendix F.

**Discussion Leading**

*How to Prepare to Lead a Discussion*

1. Determine the overall objective
   - Why are you going to lead this discussion?
   - What is the end result you want to achieve?

2. Define the topic clearly and concisely
   - Collect facts and information about it.
   - Arrange your material in a logical, usable order.

3. Consider the group
   - What are they likely to know, feel, and think, about this subject already?
   - What are the possible objections and conflicts?

4. Prepare a detailed discussion outline
   - Decide which aspects of the subject you want the group to consider.
   - Decide how much time is available for each aspect.
   - Prepare your introductory remarks carefully.
   - Have a well thought-out opening question.
   - Set intermediate objectives.
   - Frame appropriate questions for each phase of the discussion.

5. Have everything ready
   - See that members of the group are informed in good time about the date, time, and place of the meeting.

- Arrange the accommodation satisfactorily   lighting, heating, seating, ventilation, etc.
- Make sure that all necessary materials, handouts, equipment, audio-visual aids are ready in time.

**How to Lead a Discussion**

1. Get off to a good start
   - Start the meeting on time.
   - Try to make the group feel at ease.

2. Lead in to the discussion
   - State the general purpose of the discussion.
   - Announce the topic clearly and concisely.
   - Explain the discussion procedures and define its limits.
   - Introduce the topic.

3. Guide the discussion
   - Encourage participation by all members.
   - Control the over-talkative member.
   - Draw out the shy member.
   - Don't allow one or two members to monopolize.
   - Deal tactfully with irrelevant contributions.
   - Avoid personal arguments.
   - Keep the discussion moving.
   - Keep the discussion on the subject.
   - Summarize frequently.
   - Use audio-visual aids.

4. Summarize the discussion
   - Review the highlights of the discussion.
   - Review the conclusions that have been reached.
   - Make clear what has been accomplished by the discussion.
   - Re-state any minority viewpoint.
   - Get agreement for any action proposed.
   - End on a high note.

**Questions and Their Uses in Discussion Leading**

**Here are several uses for questions:**

- To get all members of the group involved in the discussion.
- To draw out quiet, shy or backward members.
- To start people thinking.
- To awaken interest.
- To fin out what previous knowledge of the subject members may have.
- To keep the discussion moving.

- To keep the discussion on the subject or bring it back to the subject.
- To recall a 'wandering' mind.
- To stop private conversations.
- To prevent monopolization by one member.
- To draw out members' experience which may be relevant and helpful.
- To get each member to hear a range of opinions all different from her/his own.
- To put a 'difficult' member in her/his place.
- To highlight important aspects of the subject.
- To check on the group's assimilation of the subject matter.

**The Types of Questions**

Broadly speaking, there are two types of questions:

1) The general question (sometimes referred to as the "overhead" question) is addressed to the group as a whole. The discussion leader wants to stimulate thinking by all members of the group. If s/he names the person who is to answer before s/he asks the question s/he is simply encouraging all the other members to go to sleep while the "victim" tries to answer. If s/he puts the question to the group as a whole, every member of the group has to rack her/his brains. In addition, by using a direct question too early in the discussion, s/he may embarrass members of the group by asking them questions that they are not yet ready to answer.

2) The direct question is addressed to an individual. It has definite advantages in certain circumstances but it must be used with care. It could, for example, put the person to whom it is addressed in the very uncomfortable and embarrassing position of having to reply when s/he just does not have anything to say. On the other hand, if there is an acknowledged "expert" on the topic under discussion in the group, the direct question can be used to draw upon her/his experience. It can also be used to draw a shy member into the discussion, but in this case the question should be carefully chosen and one that s/he is pretty sure to be able to answer. It can also be used to break up private conversations or to interrupt a "monopolizer" (i.e., by asking someone else to comment).

Note that it is a useful technique to phrase the question as a general question first, pause to allow all the members of the group to think, and then name the individual who should answer; e.g., "What do you consider the basic reason why this situation arose   (pause)   Mr. Smith?"

Another form of the direct question is what is sometimes described as the "pick-up" question. This is used to refer back to a contribution that got passed over in the 'heat' of the discussion. This frequently happens with a contribution from a shy member who may speak rather quietly and be interrupted by a more

aggressive or more vocal member. The important thing is that the leader should make a mental note at the time and come back to the point later if only to give recognition to the contributor. Here is an example: "I believe that you were saying a few minutes ago, Mr. Smith, that you had found a new way of dealing with this particular type of problem. Would you like to tell us a little more about it?"

We have said that every question is either a general question or a direct question. In addition, questions can be further divided into a number of categories. A few are described below.

An open question is expressed in very broad terms and is capable of a wide variety of answers. It is usually prefixed by who, what, when, where, how, why.

"Who ought to be responsible for taking action in this type of situation?"
"Why is it important that an office should have a sound evaluation scheme?"
"What are the advantages of supervision systems?"

A factual question seeks facts, information data, etc.

"How many members of the group have attended a previous lawyer training course?"
"Which of you have previous experience in legal services type settings?"

A *re-directed* question is used when members of the group put specific questions to the discussion leader. s/he should, wherever possible, re-direct them to other members of the group. This keeps the group active and prevents a dialogue between the discussion leader and one member.

In the case of a *rhetorical question*, the leader does not expect the group to answer and the group knows this. They know that no answer is required or the leader will answer himself, e.g., "In these circumstances what else could I do but go along with the crowd?"

In a *leading question*, the answer is implicit in or suggested by the question, e.g., "This sort of behavior is quite unacceptable isn't it?"

One comes across many other categories of question in the literature on the subject including, for example, imperative, exploratory, provocative, controversial and ambiguous. But the categories dealt with above are the most important in the industrial discussion group situation. Of the five categories, the last two, rhetorical and leading, have *no value in discussion leading*. They do not provoke the group members to think and they do not stimulate further discussion. In any case, the leading question is usually considered slightly "improper." If you have the choice, try to pose questions most frequently in the "open" or "neutral" or "non- directive" form.

**General Hints on the Use of Questions**

1. Questions should be brief, clear and simply worded.

2. Direct questions should be distributed at random. A fixed order, e.g., clockwise around the group should be avoided at all costs. They should also be well distributed among the various members of the group.

3. Questions should, as far as possible, cover one point only.

4. Questions should, where possible, be related to the ability and experience of the person to whom they are addressed.

5. Having asked the questions, give the members of the group time to think before expecting an answer.

6. Don't use rhetorical or leading questions to try to get out of a difficult or awkward situation in the group. This is more likely to make the situation worse.

**Working with People in Training**

| How S/He Acts | Why | What to Do |
|---|---|---|
| **Overly Talkative** | S/he may be an "eager beaver" or a showoff. <br><br> S/he may also be exceptionally well-informed and anxious to show it, or just naturally wordy. | *Don't be embarrassing or sarcastic … you may need her/his traits later on.* <br><br> *Slow him/her down with some difficult questions.* <br><br> *Interrupt with: "That's an interesting point … now let's see what the group thinks of it."* <br><br> *In general, let the group take care of her/himself as much as possible.* |

| How S/He Acts | Why | What to Do |
|---|---|---|
| **Highly Argumentative** | Combat personality … professional heckler; or<br><br>May be normally good-natured but upset by personal or job problems. | *Keep your temper firmly in check … don't let the group get excited either.*<br><br>*Honestly try to find merit in one of her/his points … express your agreement (or get the group to do so) … then move on to something else.*<br><br>*When s/he makes an obvious misstatement, toss it to the group … let them turn it down.*<br><br>*As a last resort, talk to her/him privately during a recess … try to find out what's bothering her/him … see if you can win her/his cooperation.* |
| **Quick Helpful** | Really trying to help. Actually makes it difficult, keeps others out. | *Cut across her/him tactfully by questioning others.*<br><br>*Thank her/him; suggest, we put others to work."*<br><br>*Use her/him for summarizing.* |
| **Rambler** | Talk about everything except subject.<br><br>Uses far fetched analogies, gets lost. | *When s/he stops for breath, thank her/him, refocus her/his attention by restating the relevant points and move on.*<br><br>*Grin, tell her/him the point is interesting, point to flipchart or blackboard and in a friendly manner indicate we are a bit off subject.*<br><br>*As a last resort, glance at your watch.* |

| How S/He Acts | Why | What to Do |
|---|---|---|
| **Personality Clash** | Two or more members clash.<br><br>Can divide your group into factions. | *Emphasize points of agreement, minimize points of disagreement, if possible.*<br><br>*Draw attention to objectives. Cut across with direct question on topic.*<br><br>*Bring another member into the discussion.*<br><br>*Frankly ask that personalities be omitted.* |
| **Obstinate** | Won't budge!<br><br>Prejudices.<br><br>Hasn't seen your points. | *Throw her/his view to the group; have group members straighten her/him out.*<br><br>*Tell him or her/his that time is short, you'll be glad to discuss it later; ask her/him to accept group viewpoint for the moment.* |
| **Wrong Subject** | Not rambling, just off base. | *Take blame yourself – "Something I said must have led you off subject – this is what we should be discussing" (restate point or use flipchart or blackboard).* |
| **Griper** | Has pet peeve.<br><br>Professional griper.<br><br>Has legitimate complaint. | *Point out we can't change policy here; problem is to operate as best we can under the system.*<br><br>*Indicate you'll discuss the problem with her/him privately later on.*<br><br>*Have a member of the group answer her/him.*<br><br>*Indicate pressure of time.* |

| How S/He Acts | Why | What to Do |
|---|---|---|
| **Side Conversation** | May be related to the subject.<br><br>May be personal.<br><br>Distracts members and you. | *Don't embarrass them. Call one by name, ask her/him an easy question; or*<br><br>*Call one by name, then restate last opinion expressed or last remark made by group member and ask her/his opinion of it.*<br><br>*If you are in the habit of moving around the room while you present, saunter over and stand casually behind members who are talking. This should not be made obvious to the group.* |
| **Inarticulate** | Lacks ability to put thoughts in proper words.<br><br>Is getting the idea, but can't convey it.<br><br>Needs help. | *Don't say "what you mean is this …," but rather say "Let me repeat that" and then put it in better language.*<br><br>*Twist her/his ideas as little as possible, but have them make sense.* |
| **Definitely Wrong** | Member comes up with comment that is obviously incorrect. | *Say, "I can see how you feel" or "that's one way of looking at it."*<br><br>*Say, "I see your point, but can we reconcile that with the (true situation)?"*<br><br>*Must be handled delicately.* |
| **Won't Talk** | Bored.<br><br>Indifferent.<br><br>Feels superior.<br><br>Timid.<br><br>Insecure. | *Your action will depend on what's motivating her/him.*<br><br>*Arouse her/his interest by asking for her/his opinion.* |

| How S/He Acts | Why | What to Do |
|---|---|---|
| **Won't talk (continued)** | | *Draw out the person next to her/him and then ask the quiet person to tell the person on her/his other side what s/he thinks of the view expressed.*<br><br>*If s/he is seated near you, ask her/his opinion so that s/he'll feel s/he is talking to you, not group.*<br><br>*If s/he is the superior type, ask for her/his view after indicating the respects you hold for experience. (Don't overdo this lest the group resent it.)*<br><br>*Irritate her/him for a moment by tossing a provocative query. If the sensitive person won't talk, compliment her/him the first time s/he does. Be sincere!* |
| **Ask You for Your Opinion** | Trying to put you on the spot.<br><br>Trying to have you support one view.<br><br>May be simply looking for your advice. | *Generally you should avoid solving their problems for them. Never take sides.*<br><br>*Point out your view is relatively unimportant compared to the view of the other participants.*<br><br>*Don't let this become a phobia. There are times when you must – and should – give a direct answer. Before doing so, try to determine her/his reason for asking your view. Say, "First, let's get some other opinions … Say, "How do you see this point?"* |

**Trainer's Notes on Role Playing**

From the trainer's point of view the first role-playing is crucial. It is at this time that the group's attitudes to the technique will be determined and their future performance as role players will be settled. The role-playing session should start by the trainer briefing all the participants. He should outline the situation that is to be the basis of the role-playing and she/he should give a concise description of the characters involved in the situation. This being done, the group then acts out the situation making up their lines as they go along. At the end of the scene the actors and the audience discuss what has taken place during the scene, the motivations of the people involved and why the scene developed as it did.

In a role-playing situation that is effectively handled not only the actors but also the audience become involved and this involvement often carries over to the discussion thereby enriching and enlightening it.

If the trainer wishes to involve the audience further s/he may give members of the audience definite tasks to carry out during the scene. For instance, one member of the audience may be required to note the gestures and mannerisms of the actors, another may be briefed to listen for significant remarks and yet another may be asked to try and spot focal points of the drama. Another useful way of involving the audience is to ask certain members of the audience to act as understudies or prompts for the actors.

Role-playing can be elaborated by the use of several associated techniques. Most obvious is role reversal, the change of character from, for instance, lawyer to client. This can be further elaborated so that roles are changed several times during the scene thus providing the actors with different viewpoints from which to observe and become involved in an on-going sequence of events. If required a scene can be repeated several times with the actors changing roles at the completion of each scene.

The main advantages of role playing are:

1. Role playing provides an opportunity for developing insight into what is happening when it is happening.
2. Role playing emphasizes the importance that feelings and emotions play in many problems, especially problems associated with human relations.
3. Role playing enables the learner to see a situation from a perspective different to her/his own.
4. Role playing, successfully handled, develops the interest of the learner, thereby providing a dynamic situation during the course of which attitudes can be modified and new attitudes developed.

## Co-Training

**Questions for Preparation**

Well-run training is like a stage play in that the trainers (actors) have rehearsed their parts. That means that they have not only learned and practiced the content (lines), but have also spent time learning all the movement and interaction (stage blocking) between the trainers and how these interactions and flow affect the audience.

All this can be referred to as STAGING.

In a play, the staging is usually written out along with the dialogue; the director's task then is to work on blocking (exactly who stands/moves where, how and when) and the delivery of the lines. In training, it is important that the co-trainers pay equal attention to such issues of delivery of content, who is speaking when, how is their position relative to each other and to the audience and how they are interacting. Since the lines are seldom set as in a play, the following considerations are suggested to provide a framework for a discussion between co-trainers so that they might share their preferences on a number of matters. There are no right or wrong answers   merely a need to be as clear as possible. When the trainers have established clarity between themselves about the training tasks and issues, the audience will sense that smoothness as well, and be more receptive to the content of training.

Here are some considerations:

1. Share past history of training; experience with small groups, large groups, times training went well and when it didn't.
2. Continue discussion of individual training styles   how you act as a leader/trainer, what are your "leader behaviors," what are your goals for yourself as a trainer?
3. How do each of you prepare for training? Do you intend to use notes? Do you write out what you say, work from notes or an outline, or do you "wing it?"
4. Discuss goals for the sessions   public ones for the participant learning, private ones for each of you, for the two of you together.
5. Discuss who will present which part of the material? Will you take equal amounts of time? Who does which part most effectively?
6. Will there be a "lead" trainer? Which style shown below will you use?
   a) equal and parallel
   b) equal but one assuming lead
   c) leader and assistant

7. Where will each of you stand (or sit) during the training? When one of you is presenting, where should the other be?

8. Discuss how each of you will want to arrange the room? Why would you arrange it in this manner?

9. How will you handle your introductions as trainers? Does the material provide for introductions or does it need to be added?

10. Discuss use of Flip Chart.

11. How is the flow of the session determined? How does each of you feel about staying on task and on time? If there is to be a decision about changing that flow, who decides? How do you tell the other? Will the non-trainer be a timekeeper?

12. How does each of you support the other? Is it permissible to interrupt? Can the other add material/information during a session? What will be your verbal and/or hand signals?

13. How does each of you ask questions? Are the styles similar, complementary, and different?

14. How will you handle it if the two of you disagree during the training?

15. How do you "read" the audience (sense how the audience is receiving and reacting to your training)? What do you look for? How do you know if you're being effective? If you sense things aren't going well, what will you think? What can each of you do about it to change the situation at that point?

16. Who will have the "last word" of the training?

Just as you should take time to discuss these factors (and others which may occur to you), you should also plan to spend time with your co-trainer after the training to discuss how everything went.

| | |
|---|---|
| **The Art of Facilitation** | Keep on track   attention to staying on time is at least half your role. |
| | Creating a safe environment for everyone to participate in is most of the other half: |
| | • Encourage the quiet types, gently, to speak, and help them feel good about their contribution ("good comment," "very clever idea," etc.) |
| | • Get garrulous types to let others speak |
| | "Let's save this for later." |
| | "How about YOU,..." |
| | "Does anyone else want to speak to that issue?" |
| | • Prevent judgmental types from stifling ideas: |
| | "Let's leave the idea out there and maybe we can adjust it later." |
| | "Can you think of a way to playoff that idea and come up with another?" "Right now we're looking for quantity   we'll deal with issues of quality in the next session/when we're out of ideas." |
| | • Don't let yourself get involved in arguments. |
| | • If you have an opinion, make it clear you're speaking as yourself, not as the facilitator |
| | "I'm stepping out of my facilitator role here for a second, but…" Ask questions, rather than making statements |
| | • Guide the group along only if and when necessary |
| | • Get people to be specific when they give input   don't assume you (or the others) know exactly what the person means without more detail: |
| | "What exactly do you mean by that?" |
| | "Can you give me/us an EXAMPLE?" |
| | "Do you mean to say that..." |
| **Strategies for Group Management** | **To help facilitate inclusion do:** |
| | 1. Build in enough time for allowing people to get to know one another in a fun non-threatening way. |
| | 2. Build bridges between participants like a good host or hostess. |
| | 3. Make sure the learning environment is warm and welcoming. |
| | 4. Clarify the purpose of the group and the learning expectations so that people can see how they "fit" in the group. |

**To promote learner control:**

1. Allow for some choice in activities.

2. Remain nondefensive.

3. Practice "gatekeeping" – enable many people to participate by encouraging more withdrawn people, and by containing the more talkative.

**To promote learner intimacy:**

1. Vary small group and large group activities. This permits more intense, interpersonal interaction, but allows for those who prefer the impersonality of larger groups.

2. Allow people to choose the level of disclosure with which they are most comfortable. Never pressure a person to participate.

3. Vary directing the group in forming small groups and allowing people to select their own partners.

Adults come to training because they want to learn. Occasionally, the expressions of the inclusion, control and affection needs that participants bring with them can create problems for the trainer. By remembering that the difficult behavior an individual participant presents grows out of his or her personal needs, a trainer can avoid misinterpreting the behavior as a personal attack. Trainers can respond with sensitivity rather than defensiveness.

**Small Groups**

Using smaller groups or breakouts for exercises or to process information is a good practice and important tool. Remember to:

- Change membership unless keeping membership the same is important.

- Appropriately arrange room.

- Set and stick to time limits for all activities.

- Ask the group to assign team leaders and/or recorders when needed.

- Have small groups report back to large group.

- Circulate!

**Conclusion**

The presentations you develop and implement in your local and regional areas will each have unique qualities and varied outcomes.
Participant responses to training and presentations are as varied as are the individuals with whom you will interact. You will infuse into each new program the lessons learned from previous programs.
This guide was designed to lessen the likelihood of omitting important steps by providing you with a process for systematically planning and implementing presentations and training programs.
Feel free to tailor the steps to fit your needs and the needs of those you serve.

# APPENDIX A

## Sample Training Needs Assessment Instruments

**Program on Employment and Disability**


Name (optional)_____     Date_____

Organizational Name_____

Program Title_____


## Training Needs Assessment


**Attendees' / Participants' Organizations**
(Please choose the one that is most appropriate)

___ 1.  Business Organization and/or Establishment
___ 2.  Labor Organization
___ 3.  Disability Advocacy Organization
___ 4.  Voluntary Organization
___ 5.  Educational Institution
___ 6.  State and/or Local Government Agency
___ 7.  Service Provider Organization
        (Nonprofit and private sector rehabilitation service provider)
___ 8.  Insurance Agency
___ 9.  Workers' Compensation Organization
___10.  Other (describe)_____


**Attendees' / Participants' Job Titles**
(Please choose the one that is most appropriate)

___ 1.  State Agency Personnel
___ 2.  Social Security Professional
___ 3.  Benefits Officer
___ 4.  Medical Director
___ 5.  Job Placement/Job Development Specialist
___ 6.  Rehabilitation Counselor/Employment Specialist
___ 7.  Workers' Compensation Professional
___ 8.  Insurance Industry Professional
___ 9.  Advocacy Organization Personnel
___10.  Consumer/Person with a Disability
___11.  Family Member of a Person with a Disability
___12.  Other (describe)_____

**Program on Employment and Disability**


*Directions:* *Using the following scale, please rate each of the Social Security Administration Disability Programs and Work Incentives topics below in relation to your professional training needs by marking 1 to 4 on the Answer Sheet. Your feedback enables us to plan our training offerings in the coming year in the way that best meets your particular needs. Our thanks to you for your assistance.*

|  |  | Least<br>Need |  |  | Greatest<br>Need |
|---|---|---|---|---|---|
| 1. | Organization of Disability Programs | 1 | 2 | 3 | 4 |
| 2. | Definition of Disability | 1 | 2 | 3 | 4 |
| 3. | Disability Determination Service | 1 | 2 | 3 | 4 |
| 4. | SGA | 1 | 2 | 3 | 4 |
| 5. | Using Work Incentives During Eligibility | 1 | 2 | 3 | 4 |
| 6. | Title II Eligibility | 1 | 2 | 3 | 4 |
| 7. | Title XVI Eligibility | 1 | 2 | 3 | 4 |
| 8. | Deemed Income | 1 | 2 | 3 | 4 |
| 9. | Resources | 1 | 2 | 3 | 4 |
| 10. | In-Kind Support | 1 | 2 | 3 | 4 |
| 11. | Benefits for the Homeless | 1 | 2 | 3 | 4 |
| 12. | Drug and Alcohol/Representative Payee | 1 | 2 | 3 | 4 |
| 13. | Application Procedures | 1 | 2 | 3 | 4 |
| 14. | Presumptive Eligibility | 1 | 2 | 3 | 4 |
| 15. | Appeals Process | 1 | 2 | 3 | 4 |
| 16. | Trial Work Period | 1 | 2 | 3 | 4 |
| 17. | Continuing Disability Review / TWWIIA Protections | 1 | 2 | 3 | 4 |
| 18. | Extended Period of Eligibility | 1 | 2 | 3 | 4 |
| 19. | Two Medicare Programs | 1 | 2 | 3 | 4 |
| 20. | 1619A | 1 | 2 | 3 | 4 |
| 21. | Break-Even Point | 1 | 2 | 3 | 4 |
| 22. | 1619(b). | 1 | 2 | 3 | 4 |

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| | | | | | |
|---|---|---|---|---|---|
| 23. | Medicaid Covered Services. | 1 | 2 | 3 | 4 |
| 24. | Medicaid Buy-In. | 1 | 2 | 3 | 4 |
| 25. | Section 301. | 1 | 2 | 3 | 4 |
| 26. | Impaired-Related Work Expense (IRWE). | 1 | 2 | 3 | 4 |
| 27. | Allowable IRWE Deductions. | 1 | 2 | 3 | 4 |
| 28. | IRWE Computation. | 1 | 2 | 3 | 4 |
| 29. | Plans for Achieving Self-Support (PASS). | 1 | 2 | 3 | 4 |
| 30. | PASS Approval Requirements. | 1 | 2 | 3 | 4 |
| 31. | When to Establish a PASS. | 1 | 2 | 3 | 4 |
| 32. | Calculating PASS. | 1 | 2 | 3 | 4 |
| 33. | Deciding Between PASS and IRWE. | 1 | 2 | 3 | 4 |
| 34. | Concurrent PASS and IRWE. | 1 | 2 | 3 | 4 |
| 35. | Employer Subsidies. | 1 | 2 | 3 | 4 |
| 36. | Agency-Sponsored Subsidies. | 1 | 2 | 3 | 4 |
| 37. | Subsidy for the Self-Employed. | 1 | 2 | 3 | 4 |
| 38. | Indicators of Possible Subsidies. | 1 | 2 | 3 | 4 |
| 39. | Determining Subsidy. | 1 | 2 | 3 | 4 |
| 40. | Blind Work Expense. | 1 | 2 | 3 | 4 |
| 41. | Student Earned Income Exclusion (SEIE). | 1 | 2 | 3 | 4 |
| 42. | Property Essential to Self-Support (PESS). | 1 | 2 | 3 | 4 |
| 43. | Advocacy. | 1 | 2 | 3 | 4 |
| 44. | Proactive Benefit Monitoring. | 1 | 2 | 3 | 4 |
| 45. | Ticket to Work. | 1 | 2 | 3 | 4 |
| 46. | Expedited Reinstatement of Benefits. | 1 | 2 | 3 | 4 |
| 47. | Impact on Other State/Federal Programs. | 1 | 2 | 3 | 4 |
| 48. | Other (specify): _____ | 1 | 2 | 3 | 4 |

**Program on Employment and Disability**


## Work Incentives Information
## Needs Assessment Survey


1.  Please indicate your understanding of the implications of work on SSA disability benefit programs.

    (little/no understanding)   1     2     3     4     5   (excellent understanding)

2.  Have you received information on work incentives from:  (check all appropriate)

    ___  SSA                              ___  Educational Institutions
    ___  Disability Groups                ___  Private Consultants
    ___  Government Agencies              ___  Law Firms
    ___  Federal                          ___  Word of Mouth
    ___  State                            ___  Other (specify)_____
    ___  Department of Social Services    ___  None

3.  Would you like to receive information and/or training regarding work incentives?

|  | Want Information | Want Training |
|---|---|---|
| Eligibility Process and Substantial Gainful Activity (SGA) | ___ | ___ |
| Title II Eligibility | ___ | ___ |
| Title XVI Eligibility | ___ | ___ |
| Application Procedures | ___ | ___ |
| Appeals Process | ___ | ___ |
| Title II | ___ | ___ |
| Title XVI | ___ | ___ |
| Work Incentives Basics | ___ | ___ |
| Section 301 | ___ | ___ |
| Impairment-Related Work Expense (IRWE) | ___ | ___ |
| Plan for Achieving Self-Support (PASS) | ___ | ___ |
| Subsidy | ___ | ___ |
| Blind Work Expense | ___ | ___ |
| Student Earned Income Exclusion (SEIE) | ___ | ___ |
| Property Essential to Self-Support (PESS) | ___ | ___ |
| Advocacy | ___ | ___ |
| Ticket to Work | ___ | ___ |
| CDR Protections | ___ | ___ |
| Expedited Reinstatement of Benefits | ___ | ___ |
| Medicare | ___ | ___ |
| Medicaid | ___ | ___ |
| Impact on Other State/Federal Benefits | ___ | ___ |

**Program on Employment and Disability**

4.      What is your preferred method of receiving information?  Please check as many as you would find useful.

| | | | |
|---|---|---|---|
| ___ | Newsletter | ___ | Training Session |
| ___ | In-House Training | ___ | Videotape |
| ___ | Electronic Bulletin Board | ___ | Fact Sheets |
| ___ | 800 Number Information Line | ___ | Other (specify)_____ |

<u>**Optional**</u>

To better serve your individual information and training needs, please tell us more about your organization.

5.      What trade publications do you read?

6.      If you have a newsletter and would like a work incentives article or information about training the public, please include the name and address of the appropriate contact person.

7.      What is the size of your organization?  (Number of employees)

1 — 15 ___    16 — 25 ___    26 — 100 ___    101 — 250 ___    251 — 500 ___    500+ ___

8.      Name of Organization / Company

Name of Contact Person

Address


City, State, Zip Code

Telephone Number

Fax Number

Type of Business

**Program on Employment and Disability**


**Social Security Administration Disability, Return to Work, and Work Incentive Programs**
**Information and Training Needs Assessment**


We are assessing the needs that individuals with disabilities and others have in their efforts to implement and monitor Social Security Administration Disability Programs and Work Incentives.

This questionnaire contains items of relevance to SSA disability, return-to-work, and work incentive programs. We would like you to rate the need described in each item, indicate how best the need can be fulfilled, and suggest which organization/agency representatives would be the best recipient for the service. We have left space for comment after each item should you desire to provide additional input.

When rating the need for each item, please use this rating scale:

    Very Important "3"          Somewhat Important "2"        Not Important "1"

After you rate the need, please check whether the need could best be met by <u>information service</u>, which would include pre-printed materials, telephone, and correspondence; <u>training</u>, which would consist of a minimum of several hours of first-hand instruction from experts; or <u>direct consultation</u>, which would include experts visiting to provide assistance at your site. Check only one of these services for each item. Finally, there is space provided for you to indicate who best should receive the assistance. Use titles to identify individuals, such as personnel director, medical director, or line supervisor.

| | Need | Rating of Importance | Information Service | Training | Consultation |
|---|---|---|---|---|---|
| 1. | Organization of Disability Programs | ___ | ___ | ___ | ___ |
| 2. | Definition of Disability | ___ | ___ | ___ | ___ |
| 3. | Disability Determination Service | ___ | ___ | ___ | ___ |
| 4. | SGA | ___ | ___ | ___ | ___ |
| 5. | Using Work Incentives During Eligibility | ___ | ___ | ___ | ___ |
| 6. | Title II Eligibility | ___ | ___ | ___ | ___ |
| 7. | Title XVI Eligibility | ___ | ___ | ___ | ___ |
| 8. | Deemed Income | ___ | ___ | ___ | ___ |
| 9. | Resources | ___ | ___ | ___ | ___ |
| 10. | In-Kind Support | ___ | ___ | ___ | ___ |


        

**Social Security Administration Disability, Return to Work, and Work Incentive Programs**
**Information and Training Needs Assessment**

| Need | Rating of Importance | Information Service | Training | Consultation |
|---|---|---|---|---|
| 11. Benefits for the Homeless | ___ | ___ | ___ | ___ |
| 12. Drug and Alcohol/Representative | ___ | ___ | ___ | ___ |
| 13. Application Procedure | ___ | ___ | ___ | ___ |
| 14. Presumptive Eligibility | ___ | ___ | ___ | ___ |
| 15. Appeals Process | ___ | ___ | ___ | ___ |
| 16. Trial Work Period | ___ | ___ | ___ | ___ |
| 17. Continuing Disability Review and TWWIIA protections | ___ | ___ | ___ | ___ |
| 18. Extended Period of Eligibility | ___ | ___ | ___ | ___ |
| 19. Two Medicare Programs | ___ | ___ | ___ | ___ |
| 20. 1619A | ___ | ___ | ___ | ___ |
| 21. Break-Even Point | ___ | ___ | ___ | ___ |
| 22. 1619B | ___ | ___ | ___ | ___ |
| 23. Medicaid Covered Services | ___ | ___ | ___ | ___ |
| 24. Section 301 | ___ | ___ | ___ | ___ |
| 25. Impairment-Related Work Expense (IRWE) | ___ | ___ | ___ | ___ |
| 26. Allowable IRWE Deductions | ___ | ___ | ___ | ___ |
| 27. IRWE Computation | ___ | ___ | ___ | ___ |
| 28. Plan for Achieving Self-Support (PASS) | ___ | ___ | ___ | ___ |
| 29. PASS Approval Requirements | ___ | ___ | ___ | ___ |
| 30. When to Establish a PASS | ___ | ___ | ___ | ___ |
| 31. Calculating PASS | ___ | ___ | ___ | ___ |
| 32. Deciding Between PASS and IRWE | ___ | ___ | ___ | ___ |

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**Program on Employment and Disability**

**Social Security Administration Disability, Return to Work, and Work Incentive Programs**
**Information and Training Needs Assessment**

| Need | Rating of Importance | Information Service | Training | Consultation |
|---|---|---|---|---|
| 33. Concurrent PASS and IRWE | ___ | ___ | ___ | ___ |
| 34. Employer Subsidies | ___ | ___ | ___ | ___ |
| 35. Agency-Sponsored Subsidies | ___ | ___ | ___ | ___ |
| 36. Subsidy for the Self-Employed | ___ | ___ | ___ | ___ |
| 37. Indicators of Possible Subsidy | ___ | ___ | ___ | ___ |
| 38. Determining Subsidy | ___ | ___ | ___ | ___ |
| 39. Blind Work Expense | ___ | ___ | ___ | ___ |
| 40. Student Earned Income Exclusion | ___ | ___ | ___ | ___ |
| 41. Property Essential to Self-Support | ___ | ___ | ___ | ___ |
| 42. Advocacy | ___ | ___ | ___ | ___ |
| 43. Proactive Benefit Monitoring | ___ | ___ | ___ | ___ |
| 44. CDR Protections | ___ | ___ | ___ | ___ |
| 45. Ticket to Work | ___ | ___ | ___ | ___ |
| 46. Expedited Reinstatement of Benefits | ___ | ___ | ___ | ___ |
| 47. Medicaid | ___ | ___ | ___ | ___ |
| 48. Medicare | ___ | ___ | ___ | ___ |
| 49. Impact on Other State/Federal Benefits | ___ | ___ | ___ | ___ |
| 50. Other (specify): _____ | ___ | ___ | ___ | ___ |

**Program on Employment and Disability**

### Social Security Administration Disability, Return to Work, and Work Incentive Programs
### Information and Training Needs Assessment

The following information is optional.  If you provide us with this information, however, we will add your name to our mailing list and keep you informed of any work incentives assistance that may be available in your community.

Name_____ Title_____

Company/Organization_____

Address_____

City_____State_____Zip_____

Your position title (check one)

___  State Agency Representative          ___  SSA Professional
___  DDS Professional                     ___  Rehabilitation Professional
___  Independent Living Center Personnel   ___  Consumer/person with a disability
___  Advocacy/organization representative  ___  Other (specify)_____

Type of Organization (check one)

___  Private Non-profit                    ___  Private For-profit
___  Public Non-profit                     ___  Public For-profit

Type of Organization/Agency

Please explain_____

About how many people are employed by your organization?      ___

How many of these workers have disabilities?                  ___

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**Program on Employment and Disability**

### Needs Assessment Questionnaire

To help us better serve your needs in implementing Social Security Administration Disability Programs and Work Incentives please take a few minutes to answer the following questions. Indicate your answer by circling the appropriate number.  Thanks for your help.

| | **None** | **Some** | **Moderate** | **Very** | **Detailed** |
|---|---|---|---|---|---|
| What is your level of understanding of Social Security Administration (SSA) Programs? | 1 | 2 | 3 | 4 | 5 |
| What is the level of understanding of Social Security Administration (SSA) Programs at your workplace? | 1 | 2 | 3 | 4 | 5 |

| How important to you is each of the following areas of SSA information? | **Not at all** | **Slightly** | **Moderate** | **Very** | **Vital** |
|---|---|---|---|---|---|
| SSI | 1 | 2 | 3 | 4 | 5 |
| SSDI | 1 | 2 | 3 | 4 | 5 |
| SSDAC | 1 | 2 | 3 | 4 | 5 |
| PASS | 1 | 2 | 3 | 4 | 5 |
| IRWE | 1 | 2 | 3 | 4 | 5 |
| Subsidies | 1 | 2 | 3 | 4 | 5 |
| Section 301 | 1 | 2 | 3 | 4 | 5 |
| PESS | 1 | 2 | 3 | 4 | 5 |
| Blind Work Expense | 1 | 2 | 3 | 4 | 5 |
| Student Earned Income Exclusion | 1 | 2 | 3 | 4 | 5 |
| Work Incentives Advocacy | 1 | 2 | 3 | 4 | 5 |
| Ticket to Work | 1 | 2 | 3 | 4 | 5 |
| Expedited Reinstatement of Benefits | 1 | 2 | 3 | 4 | 5 |
| Continuing Disability Review and TWWIIA Protections | 1 | 2 | 3 | 4 | 5 |
| Impact on Other State/Federal Benefits | 1 | 2 | 3 | 4 | 5 |
| Medicaid | 1 | 2 | 3 | 4 | 5 |
| Medicare | 1 | 2 | 3 | 4 | 5 |

| How useful to you is each of the following types of information? | **Not at all** | **Slightly** | **Moderate** | **Very** | **Valuable** |
|---|---|---|---|---|---|
| Printed Materials (Brochures, etc.) | 1 | 2 | 3 | 4 | 5 |
| Self-Help Checklists | 1 | 2 | 3 | 4 | 5 |
| Training Seminars | 1 | 2 | 3 | 4 | 5 |
| Telephone Hotline (800#) | 1 | 2 | 3 | 4 | 5 |
| Computer Based Training | 1 | 2 | 3 | 4 | 5 |
| Video Tape Training | 1 | 2 | 3 | 4 | 5 |
| Electronic Bulletin Board | 1 | 2 | 3 | 4 | 5 |
| Referrals | 1 | 2 | 3 | 4 | 5 |
| One-on-One Assistance | 1 | 2 | 3 | 4 | 5 |

# APPENDIX B

## Calculating Training Program Costs

## Calculating
## Training Program Costs

| Course Name — | | |
|---|---|---|
| **Costs** | **Projected** | **Actual** |
| A.  ADVERTISING | | |
| Purchase of mailing list / service | | |
| Purchase of labels and / or envelopes | | |
| Printing of announcement | | |
| Mailing of announcement – bulk or first class | | |
| B.  MEETING ROOM / CONFERENCE COSTS | | |
| Meeting room rental | | |
| Audio-visual equipment rental | | |
| Name tags and course signs | | |
| Coffee breaks and / or afternoon refreshment breaks | | |
| Lunches, including gratuity – *If you decide to provide lunches, the conference facility may provide the meeting space free of charge.* | | |
| C.  INSTRUCTOR FEES AND EXPENSES | | |
| Instructor #1 fee | | |
| Instructor #2 fee | | |
| Instructor #3 fee | | |
| Instructor #4 fee | | |
| Instructor # 1 travel, including – airfare versus automobile, lodging, meals, and miscellaneous (taxis, limos, mileage to airport, etc.) | | |
| Instructor #2 travel | | |
| Instructor #3 travel | | |
| Instructor #4 travel | | |
| D. TRAINING MATERIALS | | |
| Printing or duplicating of materials | | |
| Materials presentation – in binders or folders | | |
| Purchase of additional publications | | |
| Mailing of materials to training site | | |
| Miscellaneous supplies (handouts, markers, pens, etc.) | | |

# Calculating
## Training Program Costs
### (continued)

| Course Name — | | |
|---|---|---|
| **Costs** | **Projected** | **Actual** |
| E.  REASONABLE ACCOMMODATIONS | | |
| Braille | | |
| Large print | | |
| Interpreter services (sign language / note takers, FM Audio loops, etc.) | | |
| Audio tapes / computer disks / Spanish | | |
| Lift-equipped transportation (from airport, etc.) | | |
| Sighted Guides | | |
| F.  STAFF TIME AND TRAVEL | | |
| Staff travel to training site – airfare versus automobile, lodging, meals, and miscellaneous (taxis, limos, mileage to airport, etc.) | | |
| Clerical and professional time to perform above duties | | |
| | | |
| | | |
| Total cost of above | | |
| Less amount contributed by grant or other outside sources | | |
| Overhead (profit margin) on sum of two items above | | |
| Total of three items above | | |
| | | |
| | | |
| To calculate a breakeven cost, total up all above applicable costs and divide by anticipated number of participants. | | |

*amount from total*
(               ) total cost / (               ) participants = (               ) breakeven fee to be charged

# APPENDIX C

**Planning Guide to Accommodations for Persons with Disabilities**

# Guide to Planning Conference Accommodations for Persons with Disabilities

## Conferences, Trainings, Meetings, Materials



**Prepared by the Staff of the**
**Program on Employment**
**and Disability**
School of Industrial and
Labor Relations-
Extension Division
Cornell University,
Ithaca, New York

# Guide to Conference and Training Accommodations for Persons with Disabilities

This guide is designed to be a brief outline in a checklist format of some of the accessibility accommodations that training and conference administrators may find useful in fulfilling the inclusive mission of our organizations. In this document we identify some of the most often needed items from the experience of staff in the Cornell ILR Program on Employment and Disability and suggest further resources on the back of this brochure to address each issue.

Cornell University, as a State and Federally funded entity, is guided by Section 504 of the Rehabilitation Act of 1973, and Titles II and III of the Americans with Disabilities Act. These laws address areas of general prohibitions of discrimination, as well as the requirements for making programs accessible to individuals with disabilities and for providing equally effective communication.

## Checklist for planning an accessible conference, meeting, or training

◆ *Does the hotel advertise or say it is ADA compliant?*
Accessible is a term used to describe facilities, parts of facilities, and programs in which individuals with and without disabilities can participate, use, and enter. To many, accessible is associated only with use of a wheelchair; however, it actually involves the needs of people who have visual, cognitive, or hearing disabilities as well as those with activity, manual, or mobility disabilities.

If you are unsure about the accessibility of a conference site in a distant location and are unable to make a site visit, we suggest that you contact a disability-related organization, such as an Independent Living Center (ILC) in that area and inquire with their staff as to practical accessibility of the hotel or request a site visit through that agency. Listed in the resource section at the end are websites, which provides further information about accessibility in hotels/motels.

◆ *Do you have a statement on your registration form for a participant to list an assistive aid or services needed for participation? This statement can read, for example, as*
"Please indicate any assistive aids or services you need to fully participate in the program (ie, tape, Braille, sign language interpreters, assistive listening device, dietary restrictions, etc.)?"[*]
By requesting this information at the outset, you have the time you may need to provide materials and services for the participant. If at any time you are not sure how best to provide an accommodation, always speak with the person to determine specifically their needs or preferences.

---

[*] We recommend a one to two week notice period to fulfill accommodation requests. The return date should not differ from other registration deadlines.

♦ *Have you checked on the availability of wheelchair accessible rooms in your room block*?
It is best to request confirmation of this in writing.

♦ *Can the hotel/conference facility provide assistive listening devices (ALD) for guests who are deaf, and meeting rooms that have sound systems?*
There are a variety of ALDs, with some operating on a FM radio frequency and others using infrared or induction loop technologies. In all systems, the presenter speaks into a microphone or transmitter, and the listener either uses a T-switch on their hearing aid or wears a receiver designed to work with the assistive listening device chosen.

- Loop – The transmitter is attached to a loop of wire that is placed at the perimeter of the room. The loop of wire generates an electromagnetic field that is picked up by the receiver.
- FM Loop - This signal is transmitted by an FM radio signal. An FM system is often used in classrooms for the hearing impaired or in auditory trainers for hearing impaired children.
- Infrared **-** The signal is transmitted by an infrared light signal, similar to the remote control on TVs or VCRs. An infrared system is often used in the home to amplify the TV or in movies, theaters, or public speaking situations. The infrared system requires a clear line-of-sight from the transmitter to the receiver.

♦ *Is there an accessible restroom near the meeting room?*
It is best to have these on the same floor as the meeting.

♦ H*ave you requested accessible catering setups? This includes:*
▪ Refreshment tables no higher than 34 inches
▪ Food and beverages placed toward the front so that they are easily reached
▪ No two-tiered refreshment tables (unless all items are available at both levels)
▪ If buffet style meals are served, requesting that staff be available to assist in informing participants of available options, reaching the food, and carrying plates and drinks to the tables
▪ Having straws available, which are necessary for people with some disabilities

♦ *Have you spoken directly with the individual requesting the auxiliary aid or service, to clarify the request?*

♦ *Did you discuss specific needs for alternative formats of materials, if requested?*
See following section for description of large print, Braille, text, audiotape and video captioning.

♦ *Do you know where to find Sign Language interpreters, if one is requested?*
A qualified sign language interpreter is one who can both sign what is said to the individual and voice to the hearing person what is signed. For programs that last over an hour, it is necessary to arrange for two interpreters to be present so that when an interpreter becomes fatigued, the other can relieve him/her. See the resource section at the end for a brief listing of providers in NYS.

◆ *Do you know how to obtain Computer-Assisted Real-Time Transcription (CART) Service, if requested?*
This service is similar to what a court reporter does in a courtroom.  The reporter types into the machine as the instructor or participant speaks and it is shown simultaneously on a screen.  You can also request at an added cost, disk copies and/or transcripts of the training through this service.  See the resource section at the end for a brief listing of providers in NYS.

## SOME COMMONLY REQUESTED MATERIALS ACCOMMODATIONS ARE:

◆ **Text versions of existing documents** (to be used by screen readers[*] or for Braille versions)
Plain text uses using only ASCII characters, with no special formatting, symbols, or graphics. The acceptable formats end in ".txt" or ".rtf".  It also involves rearranging information or explaining verbally any information that might otherwise be conveyed graphically.  If your document contains a table, chart, graph, or picture (graphic), a typed narrative description will need to replace it; a software text conversion will not suffice, such as "save as text".

If the document is a PDF file, and does not contain tables, figures, or equations, you can do a quick text translation using the Adobe website at http://access.adobe.com/tools.html.  If the document includes figures, tables, or equations, you will need to prepare a typed narrative description.  The newest version of Acrobat Reader (5.0) is much more compatible with screen readers than previous versions.

◆ **Large Print Conference Materials**
The font should be 18 point or higher, and can be printed on large (legal or 11x17) paper. You can make large print copies of materials with your copier.  If you enlarge it on a copier, use an original with 12 point font.  (There is a trade-off that you should confirm with the participant: enlarging it by copier makes an overly large copy but pagination remains consistent, printing it with a larger font makes the pagination different.)

◆ **Braille Conference/Training Materials**
Many participants who are blind and read Braille prefer to receive the manual either electronically prior to the conference/training or on disk at the event.  If, however, the participant requests a Braille version, detailed, lengthy items are best Brailled by a professional Braille print shop (allow two to three weeks for this service).  (See resource section following for information about National Braille Press).  Handouts such as participant lists, evaluations, brochures, and other small items can be Brailled here on campus. There is a Braille embosser at Mann Library that you can use to create Braille copies of shorter papers. (We can provide detailed instructions on this process upon request).

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• A software program, which analyzes the information on the computer screen to be "read" by a speech synthesizer.

◆ **Audiotape of materials**
Some people with visual disabilities prefer materials on tape.  If your materials contain tables, charts, or graphs that require special knowledge for interpretation, it will need to be done by a professional recorder for the blind.  Audiotapes can be produced by the Recording Studio-Vision Community Service (see resource section for contact information).  An alternative would be to have someone with a good reading voice record the materials into a tape recorder, <u>if</u> the tape is of simple narrative and is for one-time use.

◆ **Training videos**
All videos used for training or conferences should be captioned for effective communication for people with hearing disabilities.  When purchasing videos, consider purchasing an already captioned one so that if needed, they are available. If a video cannot be captioned for some reason, a transcript should be provided for a viewer who is deaf or hard of hearing.  If a video cannot be captioned for some reason, a transcript should be provided for deaf or hard of hearing viewers.  See the following resource section for video production companies.

## RESOURCES

**<u>Braille Production and Information</u>**
**National Braille Press**
88 St. Stephen Street
Boston, MA 02115-4302
Voice: 800/548-7323
Fax: (617) 437-0456
www.nbp.org

**<u>Audio Tape Recording</u>**
**Recording Studio-**
**Vision Community Service**
Robert Pierson
23A Elm Street
Watertown, MA  02472
617/972-9117
617/926-1412 (fax)

**<u>Video Captioning and Production</u>**
**Caption Max,** New York
401 Fifth Avenue, 5th Fl.
New York, NY  10016
Phone: 212-686-3644
Fax:  212-686-3229

**<u>Computer-Assisted RealTime</u>**
**<u>Transcription providers for NYS</u>**
**VERITEXT L.L.C.**
National Court Reporting Services
25B Vreeland Road, Suite 301
Florham Park, NJ  07932
973/410-4040
973/410-1313

**Government Websites:**
http://www.usdoj.gov/crt/ada/comhotel.htm
http://www.usdoj.gov/crt/ada/fivestep.htm
http://www.usdoj.gov/crt/ada/lodgesur.htm

**Disability and Business Technical Assistance Center Hotline**
**1-800-949-4232; www.adata.org**

**Independent Living Centers Nationally by State**
http://www.bcm.tmc.edu/ilru/jump1.htm

**Sign Language Interpreters in New York State**
**Sign Language Interpreter**
**Services, Inc.** (Albany area)
654 Sacandaga Rd.
Scotia, NY 12302
518/382-8325

**American Sign Language**
**Interpreting Service** (NYC area)
Contact: David/Jennifer Jondreau
212/675-1917
212/675-5443 (fax)

**Interpretek** (Rochester area)
Contact: Holly Maniatty
716/235-7500
716/235-7882 (fax)

**Southern Tier Independent**
**Center (**Ithaca/Binghamton area)
Contact: Cari Watkins-Smith
607/724-2111 x338

**Aurora Interpreters (Syracuse Area)**
Contact: Mr. Capolla
315/422-2321

**Deaf Enterprises** (NYC Area)
Contact: Celeste Owens
718/624-6841

# APPENDIX D

## Sample Program Evaluations

**Program on Employment and Disability**

Program Name: _____ Program Date: _____

Instructors: _____ Program Location: _____

## PROGRAM EVALUATION

**Evaluation Directions:** Using the following rating scale, please provide evaluation of this training program on the items below by putting a rating of 0-5 in the blank to the right of each.

| 0 | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Not Applicable | Poor | Fair | Average | Above Average | Excellent |

A.  Evaluation of ***Program Content*** and ***Instructional Approach:***

   1.  Overall program organization. _____

       Comments: _____

   2.  Use and adequacy of print materials in support of program content. _____

       Comments: _____

   3.  Overall relevance and usefulness of individual and group exercises. _____

       Comments: _____

   4.   Effectiveness of media (films, etc.) to support and supplement program content. _____

       Comments: _____

   5. Availability of resources for future reference and follow-up. _____

       Comments: _____

| 0 | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Not Applicable | Poor | Fair | Average | Above Average | Excellent |

6. How would you rate this program overall? _____

Comments: _____

B.  Evaluation of ***Instructors' Effectiveness*:**

Using the 0-5 rating scale above, please rate each instructor on the following factors:

Instructor(s)

| | _____ | _____ |
|---|---|---|
| | (Name) | (Name) |

7.  Overall knowledge of topic/preparation.　　　　　_____　_____

Comments: _____

8.  Ability to present ideas clearly
    and articulately.　　　　　　　　　　　　　　_____　_____

Comments: _____

9.　Ability to facilitate participation and　　　　　_____　_____
    participants' willingness to express
    themselves during the program.

Comments: _____

10. Ability to convey respect for, and　　　　　　　_____　_____
    openness to, opinions and ideas of
    program participants.

Comments: _____

11.  What was the <u>most worthwhile</u> part of this program?

12.  What was the <u>least worthwhile</u> part of this program?

13.  Do you have suggestions for ways we can <u>improve</u> this program?

# APPENDIX E

Training Coordination Plan,
Training Coordination Checklist, and
Training Accommodations Satisfaction Survey

# TRAINING COORDINATION PLAN

### Three Months Before the Program

- Identify the program to be run.
- Select a training location and dates to be scheduled.
- Cost out the program and identify a break-even cost.
- Secure instructors / speakers for the program. Send them a letter and contract confirming their training times, fee, lodging information, and requesting their audio-visual equipment needs.
- Secure a training site and a block of sleeping rooms (if necessary) at a hotel.
- Obtain a mailing list.
- Prepare brochure for printing and mailing.
- Request draft of training materials from instructors / speakers.
- Place order for any publications, resources, or brochures to be distributed in the program.
- Gather information surrounding training site, i.e., accessible transportation, nearest airport, directions / maps. This information will be presented to the program participants. If you have this information early enough, you will be prepared for those questions that arise surrounding these issues.

### Two Months Before the Program

- Identify any reasonable accommodations requested as you receive the registration forms back. Conference planners should follow-up and contact participants who request accommodations to ensure an "appropriate accommodation." They might include needing a copy of the manual in Braille format, on audio tapes, in large print, or in Spanish. Braille materials will usually take at least two weeks to prepare, so be sure to leave enough time. It would also be best if the person requesting the Braille copy could receive their manual prior to the program so they have time to review.
- Follow-up with instructors as to their training materials for any corrections, additions, or deletions.
- Check on status of order for publications, resources, or brochures.
- Arrange for sighted guides at the meeting site.

### Four Weeks Before the Program

- Send each registered program participant a confirmation letter and include information about their lodging reservations, maps with directions to the training site, and any pre-program reading materials that may be required.
- Arrange flights for instructors (if needed) and mail tickets to them; arrange flights for any staff going to the training.
- Finalize training materials.

### Two Weeks Before the Program

- Determine whether or not to run the program. Refer to your original costing of the course for the break-even. If the program should need to be cancelled, immediately notify the instructors, training site, lodging facility, and each registered participant.
- If the course is to be run, send the hotel a rooming list for the lodging of participants (if necessary), course instructors, and staff.

**Program on Employment and Disability**

- Send the program materials to be duplicated.  Be sure to anticipate a few late registrants by making at least two extra copies.  Make a copy for each instructor.
- Put materials together for the program, including: cover page, agenda, and autobiographical sketches of program instructors and program coordinators; materials in binders, with indices; tent cards (you may choose to use name tags instead); participant list; and announcements for upcoming programs scheduled (this time is needed for ground shipping).
- Other items that may need to be included are transparencies, handouts, sign-in sheets, certificates of completion, evaluations, pencils / pads, black markers, calculators, tape, paper clips, stapler, etc.

## One Week Before the Program

- Finalize arrangement for any catered functions, e.g., refreshment breaks, luncheons, afternoon breaks, and any dinner or social hour.
- Arrange for transportation of instructors and participants to and from the hotel and the training site.
- Place order for audio-visual equipment rental.
- If a request has been made for wheelchair-accessible transportation, arrangements will need to be made at least two weeks prior to the needed date.

## Morning of the Program

- Distribute materials in training room.  If there is going to be a registration table set up, a sign-in sheet should be made available as participants arrive.  Distribution of the may also be done as they sign in.  If you will be using name tags instead of tent cards, they should also be made available as the participants arrive.
- At this stage, those participants whose registration fee has not yet been paid can be questioned.
- Check to make sure the refreshments are available.
- Check to make sure audio-visual equipment is there / will be there and working.
- Confirm with the instructors and participants that everything is satisfactory.  The heat may need to be adjusted, a microphone may need to be turned on, or a table may need to be moved.  There are always those little last-minute things that need to be taken care of.
- Introduce the speakers and the course.

## Closing the Program

- Once everyone has completed an evaluation form, certificates of completion are passed out for those in attendance of the training program.

## One Week After the Program

- After the evaluations have been tabulated and comments collected, a thank you letter with the summary attached is always a nice follow-up for the instructors.

# TRAINING COORDINATION CHECKLIST

Course Title: _____ Date: _____

Site Location: _____

*Please check to the right when completed.*

### 1. MARKETING:

Brochure designed  _____
Brochure to blueline  _____
Brochure to print  _____
Brochure mailed  _____

### 2. INSTRUCTORS:

Instructors selected (list on back of form and complete table) _____
Confirmation letter sent _____

### 3. FACILITIES COORDINATION:

Identify site  _____
Pick training dates  _____
Confirmation letter to site  _____
Refreshments ordered  _____
A.V. equipment ordered  _____
Contract received  _____
Hotel / lodging arrangements identified  _____
Lodging confirmation sent  _____

### 4. PARTICIPANT ARRANGEMENTS:

Confirmation letter sent  _____
Special accommodations arranged  _____
Lodging arrangements made (if necessary)  _____

### 5. COURSE MATERIALS:

Materials requested  _____
Materials received  _____
Other handouts ordered  _____
Other handouts received (list on back)  _____
Materials compiled and formatted  _____
Tabs completed  _____
Manual assembled  _____
Materials mailed  _____

### 6. DATA COLLECTIONS / SUMMARIES:

Print evaluations and training needs forms  _____
CRC / CCWAVES registration form  _____
Registration sign-in sheet  _____
Evaluations summarized  _____

    E-3

**Program on Employment and Disability**

2a. INSTRUCTORS (CONTINUED):  Please document names of instructors, consultant learners, and site supervisors.

| CONSULTANT NAME | CONTACT INFORMATION | PHONE CONFIRMATION | CONFIRMATION LETTER | CONTRAC TS SENT | THANK YOU / EVAL. |
|---|---|---|---|---|---|
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

5a. COURSE MATERIALS (CONTINUED): Please list all materials ordered for course.

| MATERIALS TO BE ORDERD | ORDER INFORMATION | ORDER DATE | RECEIPT DATE |
|---|---|---|---|
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Program on Employment and Disability**

Participant Name: _____     Course Name: _____

### TRAINING ACCOMMODATION SATISFACTION SURVEY

*This survey is being used to determine your level of satisfaction with the training site, lodging accommodations, and the training in general.  Please read through the questions below and let us know how we did.*

Hotel Accommodations

Yes     No     Did you use the registration form to indicate any special accommodation needs you might have?

Yes     No     If so, were these needs met?

Yes     No     Did you encounter any difficulties in registering at the hotel?

Yes     No     Was your hotel room accessible?  If not, please explain.

Yes     No     Was your hotel room in close proximity to the elevator?

Yes     No     Did the hotel have accessible facilities for public dining?

Yes     No     Did you encounter any special problems?

Yes     No     If so, were efforts made by the hotel to meet your needs?

Transportation

Yes     No     Were you able to obtain needed appropriate transportation from the airport to the hotel?

How were arrangements for this transportation made?  (Please list the name of the transportation service provider.) _____

Yes     No     Was the transportation cost appropriate?

Training

Yes     No     Did you have any problems accessing or using the training site?

If so, what problems did you encounter? _____
_____

Yes     No     Were the training materials provided in an accessible format for you?

If not, please indicate your specific needs: _____

Yes     No     Were there any problems encountered in attending this training that were disability related?

If so, please describe the problems you encountered: _____
_____

Other

If there are any other problems you encountered, problem areas that are not covered by this survey, or any suggestions for improvement of services that can be made, please describe them:

# APPENDIX F

## Terms and Concepts Related to Blindness and Visual Impairments

**Program on Employment and Disability**

# Basic Terms and Concepts Related to Blindness and Visual Impairments

*VISUAL ACUITY* — The ability of the eye to resolve detail or form an image in high-contract detail. Poor visual acuity results in blurred and/or distorted vision.

*VISUAL FIELD* — The area or extent of physical space visible to the eye.

*TOTAL BLINDNESS* — The absence of sight. Contrary to popular belief individuals who are totally blind do not necessarily live in a world of "blackness;" some perceive only a field of "whiteness."

*LEGAL BLINDNESS* — A term used to establish eligibility for government or other benefits. An individual who is legally blind has a visual acuity of 20/200 in the better eye with the best correction or a visual field of no more than 20 degrees.

*SEVERE VISUAL IMPAIRMENT* — A loss of sight that results in the inability to read ordinary newsprint even with correction.

*LOW VISION* — A clinical diagnostic term used to describe an impaired visual condition that cannot be improved by conventional glasses, medications, or surgery.

*DEAF-BLINDNESS* — Deaf-blindness is a combination of visual and hearing impairments that is a unique condition distinct from either blindness or deafness. Individuals who are deaf-blind may experience a range of combined visual and auditory impairments, for example, total blindness and total deafness, low vision and total deafness, etc. Individuals who are deaf-blind can communicate with others using a wide range of techniques that include:

- Tactile visible American Sign Language
- Tactile visible English Sign Language
- Finger spelling
- Printing on palm
- Communication cards
- Alphabet boards