



*California Common Core Curricula for Child Welfare Supervisors*

# SUPERVISOR CORE: EDUCATIONAL SUPERVISION

*Trainer's Guide*

Version 1.0 | March 2006



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**TAB 1**

**Title Page**

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*California Common Core Curricula for Child Welfare Supervisors*

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**TAB 2**

**Acknowledgments**

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# Acknowledgments

California's Common Core Curricula for Supervisors is the result of the invaluable work and guidance of a great many people throughout the child welfare system in California and across the country. It would be impossible to list all of the individuals who contributed, but some groups of people will be acknowledged here.

The Statewide Training and Education Committee (STEC) provided overall guidance for the development of the curricula. Convened by the California Social Work Education Center (CalSWEC) and the California Department of Social Services (CDSS), STEC has a wide membership that includes Regional Training Academy (RTA) representatives, county representatives, university-based Title IV-E Project Coordinators, the Inter-University Consortium in Los Angeles (IUC), and other key stakeholders.

A subcommittee of STEC, the Content Development Oversight Group (CDOG), provided oversight and approval for the research, writing, and revising performed by curriculum developers. Additional review and guidance for the curricula was provided by a Content Advisory Team (CAT) composed of representatives from California's regional training entities, universities, and county development programs. As with many large curriculum projects in public child welfare, significant portions of the Supervisor Core were adapted from existing curricula.

Along the way, many other people provided their insight and hard work, attending pilots of the trainings, reviewing sections of curricula, or providing other assistance.

California's child welfare system greatly benefits from this collaborative endeavor, which helps our workforce meet the needs of the state's children and families.

The curriculum is developed with public funds and is intended for public use. For information on use and citation of the curriculum, please refer to:

[http://calswec.berkeley.edu/CalSWEC/CCCCA\\_Citation\\_Guidelines.doc](http://calswec.berkeley.edu/CalSWEC/CCCCA_Citation_Guidelines.doc)



**FOR MORE INFORMATION** on California's Core Curricula, as well as the latest version of this curriculum, please visit the California Social Work Education Center (CalSWEC) website: <http://calswec.berkeley.edu>

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**TAB 3**

**Background and Context**

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## BACKGROUND AND CONTEXT

### COMMON CORE CURRICULA FOR CHILD WELFARE SUPERVISORS

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#### Curriculum Development

The Common Core Curricula is the result of a multi-year statewide collaborative effort to develop standardized curricula for California’s newly hired child welfare supervisors and child welfare workers. Development and implementation of the Common Core Curricula was mandated by California’s Program Improvement Plan (PIP) as part of the 2003 federal Child and Family Services Review (CFSR). Although in-service core training had historically been provided by the Regional Training Academies (RTAs), the IUC and county staff development departments, the PIP stipulated that the California Department of Social Services (CDSS) “develop a common core curriculum for all new child welfare workers and supervisors that is delivered by all training entities statewide.” The goal of this mandate was defined as the implementation of “a common core curriculum...in every county to train all new child welfare workers and child welfare/probation supervisors.”

The **Statewide Training and Education Committee (STEC)** developed the initial series of Common Core Curricula in FY2004/2005, marking the first implementation of supervisor and new worker training that was *standardized* for the entire state. The purpose of statewide standardization is to achieve consistency and equity in the application of best and evidence-based practice in all 58 California counties. Each of the content areas of the Common Core has a set of measurable learning objectives for knowledge, skills and values essential to the provision of excellent service to families and children who participate in California’s county child welfare programs.

#### Values Underlying the Development of Common Core Training

STEC used the following underlying values in developing recommendations for common core training:

- Common core training is grounded in social work values and ethics.<sup>1</sup>

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<sup>1</sup> The National Association of Social Workers (NASW) Code of Ethics states, “Social work administrators and supervisors should take reasonable steps to provide or arrange for continuing education and staff development for all staff for whom they are responsible. Continuing education and staff development should address current knowledge and emerging developments related to social work practice and ethics...” (NASW Code of Ethics, 1996, revised 1999, Section 3.08).

CalSWEC’s Standards and Values support the use of ongoing training as a form of best practices: “Standards of practice are by their nature subject to change. In view of shifting societal standards, as well as advancing knowledge

- Common core training builds upon, but is not limited to, new worker training currently underway in California, and utilizes existing training structures.
- Standards encourage flexibility in the way counties meet identified training needs.
- Standards encourage the application of best practices aimed at improving outcomes for children and families, by training strategies that progress from knowledge acquisition to building and demonstrating skills.
- Standards endorse training delivery methods for common core training that yield measurable learning objectives and that provide the basis for evaluation of knowledge, skills, and attitude acquisition in order to promote positive outcomes for children and families.
- Standards are consistent with those endorsed by California's Title IV-E university programs for the bachelor's and master's degrees in social work.
- Common core training encourages inclusion of community partners, whenever possible, in order to share responsibility for child safety, permanency, and well-being.

### Levels of Standardization

STEC determined that content areas of the Common Core Curricula for Child Welfare Supervisors would vary in their level of standardization:

One content area has **standardized information and standard delivery**, statewide:

- *Casework Supervision*

Five other content areas have **standardized information**, with detailed instructions on delivery:

- *Child Welfare Policy and Practice for Supervisors*
- *Evidence-based Practice*
- *Fiscal Essentials*
- *Educational Supervision*
- *Managing for Results*

### Completion of the Common Core

All content areas of the Common Core Curricula for Child Welfare Supervisors must be completed within twelve months from the date of hire or promotion.

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about children, human behavior, and human ills, standards must be subject to continuous reflection and review.”  
(CalSWEC Website)

[http://calswec.berkeley.edu/CalSWEC/CalSWEC\\_Standards\\_Revised.html](http://calswec.berkeley.edu/CalSWEC/CalSWEC_Standards_Revised.html) and  
[http://calswec.berkeley.edu/CalSWEC/CalSWEC\\_Values\\_Revised.html](http://calswec.berkeley.edu/CalSWEC/CalSWEC_Values_Revised.html)

## **Foundational Themes to Guide Training and Practice**

Five foundational themes were identified for the Common Core Curricula series. The themes and their working definitions are:

### *Fairness and Equity*

A principle that promotes equivalent opportunity for all children and families to achieve positive outcomes from child welfare interventions. Fairness and equity issues often concern reducing disparities in service access across population groups and diminishing overrepresentation of ethnic minorities in the child welfare system. Policies, procedures, and/or practices based on fairness and equity principles consider the unique sociocultural context of each individual and frequently involve the expansion of culturally responsive community resources.

### *Family & Youth Engagement*

Practices and strategies congruent with relevant sociocultural dynamics that effectively engage parents, youth and extended family members in a respectful and collaborative manner in the assessment, intervention and case planning processes.

### *Strength-based Practice*

Practice that identifies strengths in an individual, family, or system, and the formulation of service arrays and interventions that acknowledge and build on those strengths. A strength-based approach honors and respects the dignity of family members and incorporates the family's collective knowledge about the resources and strengths in their family system. Strength-based practice involves joining with the family to reach goals for improvement in family functioning.

### *Outcomes-Informed Practice*

Practice that supports and is informed by federal and state outcomes. All training in California supports the federal outcomes of Safety, Permanency and Well-Being. California also has developed state-specific performance measures. These performance measures are referenced in the curricula where they apply. For more information on the performance measures in California, please refer to the website for the Child Welfare Dynamic Report System at the Center for Social Sciences Research (CSSR) at UC, Berkeley: [http://cssr.berkeley.edu/ucb\\_childwelfare/](http://cssr.berkeley.edu/ucb_childwelfare/).

### *Evidence-based Practice (“EBP”)*

The application to service delivery of research evidence related to child welfare, integrated with clinical expertise and client values. The existing body of research reflects varying levels of methodological rigor and efficacy, and differences in applicability to child welfare practice. Where available, research on child welfare practice is integrated into the common core.

## **Training Evaluation**

The evaluation components of the Common Core Curricula for Child Welfare Supervisors were developed concurrently with the creation of the curricula content. They are based on the *Training Evaluation Framework Report* developed by CalSWEC in FY 04/05 in response to the Program Improvement Plan (PIP). In addition to evaluating trainee satisfaction with the entire Common Core, *Casework Supervision* features an embedded skill evaluation. By this method of evaluation, trainees practice the skill of casework supervision and are evaluated on the basis of their responses to case scenarios presented during the course of the training. Analysis of the satisfaction and skill evaluation data is used to assist training evaluation experts to improve the training.

More information on the *Training Evaluation Framework*, as well as on training evaluation generally, can be found at: <http://calswec.berkeley.edu/CalSWEC/CWTraining.html>.

## **Revision Process**

Major revisions to the Common Core Curricula are conducted every three years or sooner, based on developments critical to effective social work practice. Minor revisions occur systematically as needed, to reflect current practice and changes in policy and legislation. Each common core curriculum is delineated by a version number (e.g., Version 1.0, 1.1, 1.2, 2.0, etc.). The type of version number indicates whether the version contains minor revisions or major revisions. For example, minor revisions are indicated by the numbered sequence Version 1.1, 1.2, 1.3, etc., while major revisions are delineated by a sequence of integer version numbers, e.g., Version 1.0, 2.0, 3.0, etc. The latest version of each curriculum is posted on the CalSWEC website.

### Principles and Values of the Revision Process

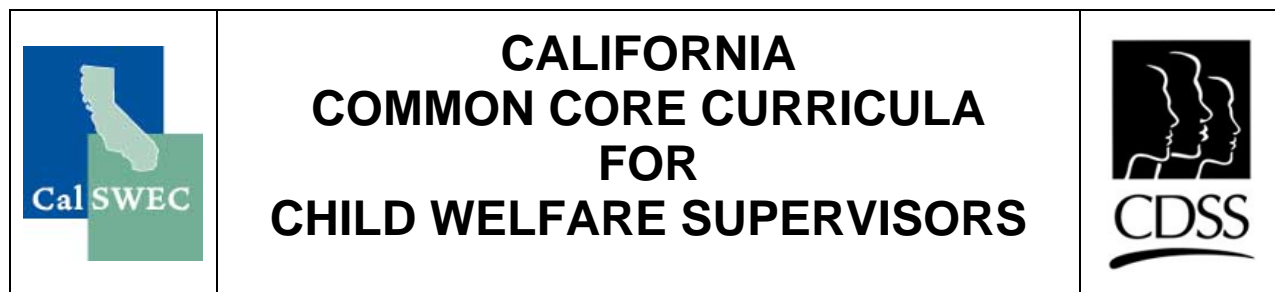
The following principles and values are applied to the design of the revision process:

- Content will reflect “state of the art” knowledge and applications
- Content will apply transfer of learning principles and strategies
- Content will support and expand upon the competencies established in the Title IV-E bachelor’s- and master’s-level social work programs
- The revision process will draw upon the combined expertise of practitioners and university partners

## **TAB 4**

### **How to Use This Guide**

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## HOW TO USE THE TRAINER'S AND TRAINEE'S GUIDES

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*Please read carefully as a first step in preparing to train this curriculum.*

**IMPORTANT NOTE:** Each curriculum within the Common Core series is mandated and standardized for all new child welfare supervisors in the state of California. It is essential that all trainers who teach any of the Common Core Curricula in California instruct trainees using the standardized *Training Content* as provided. The training of standardized content also serves as the foundation for conducting standardized testing to evaluate and improve the effectiveness of new supervisor training statewide.

### GENERAL INFORMATION

The Common Core Curricula model is designed to define clearly the content to be covered by the trainer. Each curriculum consists of a *Trainee's Guide* and a *Trainer's Guide*. The Trainee's Guide contains the standardized information which is to be conveyed to trainees. The Trainer's Guide includes guidance to assist the trainer in presenting the standardized information. *Casework Supervision* requires a standardized delivery to support the embedded skill evaluation contained in the curriculum, while the other five modules in the Common Core Curricula for Child Welfare Supervisors allow some flexibility in the delivery of the content.

The list of components of the Trainer's and Trainee's Guides described under the subheadings below vary slightly for each module of the Supervisor Common Core. It is recommended that trainers first review the Background and Context, Agenda, and Suggested Lesson Plan. Trainers can then read the Training Content and Tips in the Trainer's Guide and the Training Content in the Trainee's Guide in order to become thoroughly familiar with each topic and the suggested training activities.

The curricula are developed with public funds and intended for public use. For information on use and citation of the curricula, please refer to the Guidelines for Citation:

[http://calswec.berkeley.edu/CalSWEC/CCCCA\\_Citation\\_Guidelines\\_Rev\\_040909.doc](http://calswec.berkeley.edu/CalSWEC/CCCCA_Citation_Guidelines_Rev_040909.doc)

Please note that each individual curriculum within the Common Core Curricula is subject to periodic revision. The curricula posted on the CalSWEC website are the most current versions available. For questions regarding the curricula, contact Melissa Connelly [mconnelly@berkeley.edu](mailto:mconnelly@berkeley.edu) or Phyllis Jeroslow [pjero@berkeley.edu](mailto:pjero@berkeley.edu), or call CalSWEC at 510-642-9272.

## COMPONENTS OF THE TRAINER’S AND TRAINEE’S GUIDES

### **Background and Context**

The Background and Context describes how and why the Common Core was developed, as well as the values, levels of standardization, completion requirements, and revision process associated with the Common Core series. As an additional resource for trainers, the Background and Context also provides working definitions of the foundational themes that are interwoven throughout the Common Core, and basic information about the use of embedded skill testing for evaluating the effectiveness of the training.

### **Competencies and Learning Objectives**

The Competencies and Learning Objectives serve as the basis for the Training Content that is provided to the trainees. All the Competencies and Learning Objectives for each curriculum are listed in a separate tab in both the Trainer’s and Trainee’s Guides. The Learning Objectives are subdivided into three categories: Knowledge, Skills, and Values. They are numbered in series beginning with K1 for knowledge, S1 for skills, and V1 for values. The Learning Objectives for each segment of the curriculum are also indicated in the suggested Lesson Plan.

*Competencies* are defined as broad indicators of essential and best practices. Typically, several *Learning Objectives* support the development of each *Competency*. The *Learning Objectives* are more specific than the *Competencies* and are designed to provide measurable indicators of learning.

*Knowledge Learning Objectives* entail the acquisition of new information and often require the ability to recognize or recall that information. *Skill Learning Objectives* involve the application of knowledge and frequently require demonstration of the skill. *Values Learning Objectives* describe attitudes, ethics, and desired goals and outcomes for practice. Generally, *Values Learning Objectives* do not easily lend themselves to measurement, although values acquisition may sometimes be inferred through other responses elicited during the training process.

### **Agenda (most modules)**

The Agenda is a simple, sequential outline indicating the order of events in the training day, including the coverage of broad topic areas, training activities, evaluation (if applicable), lunch, and break times.

**Suggested Lesson Plan (*most modules, Trainer's Guide only*)**

The Suggested Lesson Plan is a mapping of the structure and flow of the training. It presents each topic in the order recommended and indicates the duration of training time for each topic. The Suggested Lesson Plan is offered as an aid for organizing the training.

The Suggested Lesson Plan is divided into major sections by Day 1 and Day 2 of the training, as applicable, and contains three column headings: Topic, Methodology, and Learning Objectives. Some Lesson Plans may have a fourth column for key Learning Points to emphasize. The Topic column is divided into training segments. The Methodology column indicates suggested training activities that accompany each segment, and the Learning Objectives column reflects the specific objectives that are covered in each segment.

**Evaluation Protocols (*Trainer's Guide; for Casework Supervision only*)**

It is necessary to follow the step-by-step instructions detailed in this section concerning the embedded skill evaluation in order to preserve the integrity and consistency of the training evaluation process. Additionally, trainers should not allow trainees to take away or make copies of *any* test materials so that test security can be maintained.

**Training Content and Tips (*Trainer's Guide only*)**

The Training Content and Tips section is the main component of the Trainer's Guide. It includes detailed descriptions, guidance, and step-by-step tips for preparing, presenting, and processing the activities. The descriptions also indicate the Training Content in the Trainee's Guide and the PowerPoint slides that accompany each activity. Thumbnails of the slides are also provided.

**Training Content (*Trainee's Guide only; can be inserted into the Trainer's Guide*)**

The Training Content in the Trainee's Guide contains the standardized text of the curriculum that accompanies the trainer's lectures and other training activities.

**Supplemental Handouts**

Supplemental Handouts refer to additional handouts not included in the Training Content tab of the Trainee's Guide. For example, Supplemental Handouts include PowerPoint printouts that accompany in-class presentations or worksheets for training activities. Some documents in the Supplemental Handouts are placed there because their size or format requires that they be printed separately.

**Glossary**

A glossary may be provided. It defines words and acronyms commonly used in child welfare practice that appear in the training content or supplemental information. The glossary is provided to help trainees learn language and terms specific to the field.

**Bibliography (*most modules, in one or both guides*)**

The Bibliography indicates the sources that were reviewed by the curriculum designers to prepare the main and supplemental content information, training tips, training activities and any other information conveyed in the training materials. It may also include additional resources that apply to a particular content area. In certain curricula within the Common Core series, the Bibliography may be subdivided by topic area.

**Materials Checklist (*Trainer's Guide only*)**

In order to facilitate the training preparation process, a Materials Checklist may be provided. The Materials Checklist indicates all the materials needed for the *entire* training. Multi-media materials may include such items as videos, CDs, posters, and other audiovisual aids.

**TAB 5**

**Competencies and Learning Objectives**

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-TRAINER'S AND TRAINEE'S GUIDES-**

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**COMPETENCY AND LEARNING OBJECTIVES**

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**Competency**

The trainee will understand various aspects of educational supervision including leadership, coaching, supervision and adult learning principles.

**Learning Objectives**

**Knowledge**

- K1. The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.
- K2. The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strength-based supervision.
- K3. The trainee will be able to understand the process of transfer of learning and what needs to occur before, during, and after training.
- K4. The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.

**Skill**

- S1. The trainee will be able to assess staff readiness to learn.
- S2. The trainee will be able to apply principles of adult learning.
- S3. The trainee will be able to encourage and assist staff to transfer knowledge and skills learned through in-service training to their jobs.

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**TAB 6**

**Lesson Plan**

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-TRAINER'S GUIDE-**

**LESSON PLAN**

<b>Topic and time</b>	<b>Methodology</b>	<b>Learning Objectives</b>	<b>Learning point</b>
<p><b>20 minutes</b></p> <p><b>Introduction of trainer</b></p> <p><b>Review of agenda and competencies</b></p> <p><b>Needs Assessment exercise</b></p>	<ul style="list-style-type: none"> <li>▪ Create safe and dynamic learning environment</li> <li>▪ Review handouts and agenda</li> <li>▪ Needs Assessment exercise</li> </ul>	<ul style="list-style-type: none"> <li>▪ K2: The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strength-based supervision.</li> <li>▪ S1: The trainee will be able to assess staff readiness to learn.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees should understand the learning objectives for the day and begin a personal plan of participation and developing personal learning goals.</li> <li>▪ Trainees will be able to demonstrate collaborative information sharing</li> </ul>

<p><b>20 minutes</b></p> <p><b>Introduction of trainer</b></p> <p><b>Review of agenda and competencies</b></p> <p><b>Needs Assessment exercise</b></p>	<ul style="list-style-type: none"> <li>▪ Create safe and dynamic learning environment</li> <li>▪ Review handouts and agenda</li> <li>▪ Needs Assessment exercise</li> </ul>	<ul style="list-style-type: none"> <li>▪ K2: The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strength-based supervision.</li> <li>▪ S1: The trainee will be able to assess staff readiness to learn.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees should understand the learning objectives for the day and begin a personal plan of participation and developing personal learning goals.</li> <li>▪ Trainees will be able to demonstrate collaborative information sharing</li> </ul>
<p><b>20 minutes</b></p> <p><b>4 Roles of Supervisor</b></p> <p>Educator and services and support self-assessment</p>	<ul style="list-style-type: none"> <li>▪ Trainees will learn the educating skills associated with supervision.</li> <li>▪ Handout and activity: Self Assessment Inventory.</li> </ul>	<ul style="list-style-type: none"> <li>▪ K2: The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strength-based supervision.</li> <li>▪ K4: The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.</li> <li>▪ S1: The trainee will be able to assess staff readiness to learn.</li> <li>▪ S3: The trainee will be able to encourage</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees will understand educating, supporting and offering resources to staff and practice assessment skills.</li> </ul>

		<p>and assist staff to transfer knowledge and skills learned through in-service training to their jobs.</p>	
<p><b>20 minutes</b></p> <p><b>Foundations of adult learning</b></p>	<ul style="list-style-type: none"> <li>▪ Presentation on Pedagogy v. Andragogy.</li> <li>▪ Introduce the continuum of having a teaching style and the elements of style.</li> <li>▪ Table discussion of the elements of adult learning.</li> <li>▪ Handout and activity: Trainees fill out “What is your Teaching Style?”</li> </ul>	<ul style="list-style-type: none"> <li>▪ K1: The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.</li> <li>▪ K4: The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.</li> <li>▪ S1: The trainee will be able to assess staff readiness to learn.</li> <li>▪ S2: The trainee will be able to apply principles of adult learning.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees will gain knowledge and understand that there are many different elements that contribute to adult learning.</li> <li>▪ Trainees will learn that teaching style and modality used affects the outcome of training.</li> <li>▪ Trainees will gain knowledge about personal teaching styles. Trainees will understand their personal teaching style.</li> </ul>

<p><b>30 minutes</b></p> <p><b>14 principles of adult learning</b></p>	<ul style="list-style-type: none"> <li>▪ Presentation of the 14 principals of adult learning.</li> <li>▪ All learners learn in different ways. Review learning styles and how to motivate and coach learners of different styles.</li> <li>▪ Handout and activity: Trainees take learning style inventory to discover their learning style.</li> </ul>	<ul style="list-style-type: none"> <li>▪ K1: The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.</li> <li>▪ K2: The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strength-based supervision.</li> <li>▪ K4: The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.</li> <li>▪ S2: The trainee will be able to apply principles of adult learning.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees increase knowledge of adult learning principals and how to apply them.</li> <li>▪ Trainees will demonstrate knowledge of the different learning styles and how to coach, mentor and motivate learners of different styles.</li> </ul>
<p><b>15 minutes. – Break</b></p>			

<p><b>30 minutes</b></p> <p><b>Motivational tools for supporting and teaching staff</b></p>	<ul style="list-style-type: none"> <li>▪ Short presentation of other motivational tools to enhance learning.</li> <li>▪ Trainees will learn the variety of the numerous opportunities that they have on a daily basis to provide “teachable moments” to staff.</li> <li>▪ Other sources of motivation for adult learners.</li> <li>▪ Handout and activity: Employee scenarios—write an individual professional development plan for staff.</li> </ul>	<ul style="list-style-type: none"> <li>▪ K1: The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.</li> <li>▪ K2: The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strength-based supervision.</li> <li>▪ K3: The trainee will be able to understand the process of transfer of learning and what needs to occur before, during, and after training.</li> <li>▪ K4: The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.</li> <li>▪ S1: The trainee will be able to assess staff readiness to learn.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainee will increase knowledge of motivational tools in a variety of modalities to assist staff with learning.</li> <li>▪ Trainee will gain knowledge and understanding of his/her role as educator and how it permeates many aspects of the job.</li> <li>▪ Trainees will understand competencies and how to apply them to drive training. Trainees will demonstrate knowledge of planning and implementation strategies for training staff.</li> </ul>
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		<ul style="list-style-type: none"> <li>▪ S2: The trainee will be able to apply principles of adult learning.</li> <li>▪ S3: The trainee will be able to encourage and assist staff to transfer knowledge and skills learned through in-service training to their jobs.</li> </ul>	
<p><b>25 minutes</b></p> <p><b>Transfer of learning—Managers and supervisors’ vital role</b></p>	<ul style="list-style-type: none"> <li>▪ Review transfer of learning grid and how vital good management is to this process, before during and after training so that learning transfers to practice.</li> <li>▪ Activity: On large tear sheets around the room put priority dots on most important strategies managers, trainees, and trainers should implement to support the transfer of learning before, during and after training.</li> <li>▪ Handout and follow up discussion: review strategies and any others that trainees may have.</li> </ul>	<ul style="list-style-type: none"> <li>▪ K3: The trainee will be able to understand the process of transfer of learning and what needs to occur before, during, and after training.</li> <li>▪ S3: The trainee will be able to encourage and assist staff to transfer knowledge and skills learned through in-service training to their jobs.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees understand the importance that managers and supervisor have in the transfer of learning process.</li> <li>▪ Trainees will gain knowledge of effective strategies for the transfer of learning to practice.</li> </ul>
<p><b>30 minutes</b></p> <p><b>Review of self-assessment</b></p>	<ul style="list-style-type: none"> <li>▪ Each trainee will review competency skills on Teacher and Services and Support self-</li> </ul>	<ul style="list-style-type: none"> <li>▪ K1: The trainee will be able to utilize factors that motivate</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees will synthesize the material that they have learned in the</li> </ul>

<p><b>and Action Planning</b></p>	<p>assessment tool. They will review the areas that they would like to further develop and, given the knowledge that they have received from the training, pick two areas where they will take specific action to practice these skills when they return to the office. They will share this information with a co-worker.</p> <ul style="list-style-type: none"> <li>▪ Handout: Teacher and Service and Support Provider Self-assessment tool: Action Plan</li> </ul>	<p>performance to assist staff in the improvement of job performance.</p> <ul style="list-style-type: none"> <li>▪ K3: The trainee will be able to understand the process of transfer of learning and what needs to occur before, during, and after training.</li> <li>▪ K4: The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.</li> <li>▪ S2: The trainee will be able to apply principles of adult learning.</li> <li>▪ S3: The trainee will be able to encourage and assist staff to transfer knowledge and skills learned through in-service training to their jobs.</li> </ul>	<p>day and apply it to their own professional development and learning plan. This will assist with the transfer of learning to practice.</p>
<p><b>10 minutes</b></p> <p><b>Summary and evaluations</b></p>	<ul style="list-style-type: none"> <li>▪ Summarize materials from the afternoon session</li> <li>▪ Complete evaluation</li> </ul>	<ul style="list-style-type: none"> <li>▪</li> </ul>	<ul style="list-style-type: none"> <li>▪ Trainees should be able to review goals for this afternoon and to summarize the main learning points</li> </ul>

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**TAB 7**

**Training Content and Tips**

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**SUPERVISOR CORE:  
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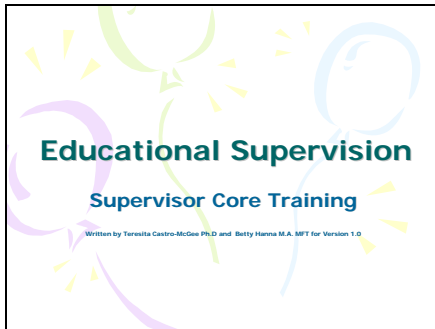
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**TRAINING TIPS AND CONTENT**

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Slide 1



**Topic**

**Introduction**

Trainer welcomes group, introduces topic and introduces her/himself.

This ½ day course addresses the role of the supervisor as an educator, mentor and coach. It will provide knowledge of adult learning theory and how it can be used by supervisors to enhance the professional development of social workers and help to ensure a well trained staff. The course will examine motivational strategies for enhancing performance as well as methods for ensuring the transfer of learning.

Introduction of Trainer (trainees may already be introduced to each other by other segments of the core).

**Suggestion:** Stress supervisor relationships that the trainer has had and how important they have been to his/her personal and professional growth (“people don’t leave jobs; they leave supervisors”). Talk about the kind of supervisor that you may have had in your “first” job as opposed to when you were experienced.

**Learning points**

Highlight the different supervisor skills associated with mentoring beginning and/or younger people v. the skills associated with supervising and mentoring more experienced staff. Generational issues can also be stressed.

**Topic**

Introduce the learning environment. Highlight

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guidelines for the training: examples – “ask questions; share with each other; be responsible for your learning time today and taking from the training what is important to you.” Highlight relaxing and having fun.

### **Learning point**

Discuss how important setting up the right environment is to facilitate learning.

### **Activity**

Optional: Bring 5 or six different colors of colored paper, about 7-10 sheets in each color (depending on how many trainees are at each table). Ask for a volunteer from each table to be the leader. You may have to encourage a little. Have the leaders come to the front and pick out a color for their table “team.” Give them the paper. Tell them that they can now remain the leader or delegate that duty to someone else. Have whoever is the leader now pass out the paper and ask trainees to make name plates for themselves with the colored pens on the table. (Note. this can be done prior to the introduction). If you wish for the trainees to move around to different tables, if they have been sitting with the same people for another portion of training, you can ask the trainees to move tables “making rainbows” with their name plates at each table so that each table has one or two of the colors only.

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Slide 2

### **Topic**

### **Learning objectives**

### **Knowledge**

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**Competencies**

**Knowledge**

- The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.
- The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strengths-supervision.
- The trainee will be able to understand the process of transfer of learning and what needs to occur before, during and after training.
- The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.

Slide 3

**Competencies**

**Skill**

- The trainee is able to assess staff readiness for learning.
- The trainee will be able to apply principles of adult learning.
- The trainee will be able to assist staff to transfer knowledge and skills learned through in-service training to their jobs.

The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.

The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strengths-supervision.

The trainee will be able to understand the process of transfer of learning and what needs to occur before, during and after training. The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.

**Skill**

The trainee is able to assess staff readiness for learning.

The trainee will be able to apply principles of adult learning.

The trainee will be able to assist staff to transfer knowledge and skills learned through in-service training to his/her job.

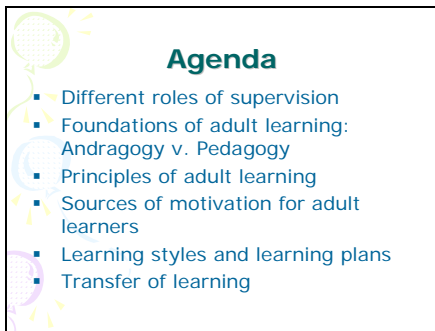
Review learning objectives.

**Learning point**

Explain what a competency is and how it relates to thinking about skills of a job position. Explain how competencies can be a tool for supervisors and managers to help guide skill-building for social workers. Explain how competencies drive a training plan and can act as an evaluative tool to ensure that learning plans are teaching skills to enhance performance on the job.

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## Slide 4



**Agenda**

- Different roles of supervision
- Foundations of adult learning: Andragogy v. Pedagogy
- Principles of adult learning
- Sources of motivation for adult learners
- Learning styles and learning plans
- Transfer of learning

## Topic

Review agenda and briefly introduce topics for the day.

## Activity

- Needs Assessment

Tell the trainees that their time is important and what they hope to accomplish from this afternoon of training is very important. Ask the leader if they would be so kind as to start a discussion at their table about what trainees would like to learn today now that they are aware of the agenda topics. It can be some of the things on the agenda or it can be other questions or topics that they may have about educational supervision. Ask the leaders to promote a trainee to be the note taker to take notes during this process.

Prepare a tear sheet with the heading “What we hope to learn today.” Note: If a group presents a topic or question that is not related to educational supervision, a “Parking Lot” tear sheet can be prepared and it can be explained that although these topics are important, they are out of the scope of learning for today, but they can be saved for a later training.

Bring group back to focus. Ask for the information that they came up with and chart information that is relevant to the class on the tear sheet. Hang tear sheet on a wall that can be seen throughout class.

## Learning point

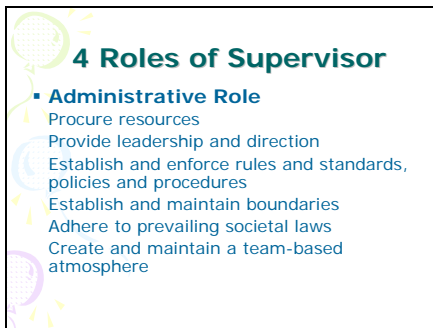
Refer back to topics that they hoped to learn as you come across them in the curriculum

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during the day.

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Slide 5



**4 Roles of Supervisor**

- **Administrative Role**
  - Procure resources
  - Provide leadership and direction
  - Establish and enforce rules and standards, policies and procedures
  - Establish and maintain boundaries
  - Adhere to prevailing societal laws
  - Create and maintain a team-based atmosphere

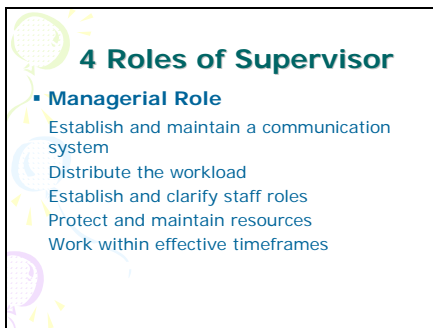
**Topic**

Short lecture on the four roles of a supervisor.  
Refer to handout.

**Learning point**

Emphasize how being a teacher permeates many areas of the job. Go over the duties of being a service and support provider to staff. Discuss how being a teacher and providing service and support go hand in hand to create a supportive and safe learning environment where staff can grow and develop their skills. Relate it also to the retention of staff. All recent studies of why child welfare social workers either stay in their position or leave (see bibliography for site) have found that having supportive, knowledgeable and guiding supervision is a primary reason that social workers stay in their positions. It has also been shown that one of the primary reasons that social workers leave is a lack of high-quality supervision.

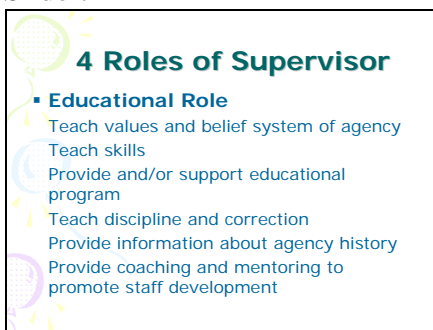
Slide 6



**4 Roles of Supervisor**

- **Managerial Role**
  - Establish and maintain a communication system
  - Distribute the workload
  - Establish and clarify staff roles
  - Protect and maintain resources
  - Work within effective timeframes

Slide 7

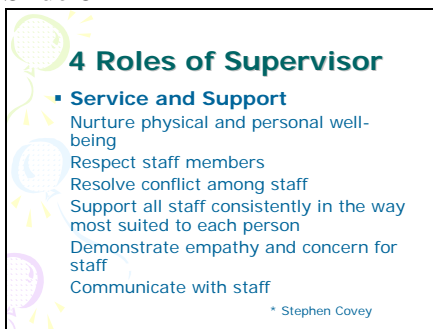


**4 Roles of Supervisor**

- **Educational Role**
  - Teach values and belief system of agency
  - Teach skills
  - Provide and/or support educational program
  - Teach discipline and correction
  - Provide information about agency history
  - Provide coaching and mentoring to promote staff development

**NOTE: At this point in the curriculum, any “Role of Supervision” tool and/or curriculum piece that you may have and feel comfortable with can be used. Your curriculum should bring awareness to the fact that the position of supervisor has multiple roles and one of the most important is the professional development of staff. This part of the curriculum should teach and practice the necessary skills and characteristics of supporting the excellent professional ongoing learning and development of staff.**

Slide 8



**4 Roles of Supervisor**

- **Service and Support**
  - Nurture physical and personal well-being
  - Respect staff members
  - Resolve conflict among staff
  - Support all staff consistently in the way most suited to each person
  - Demonstrate empathy and concern for staff
  - Communicate with staff

\* Stephen Covey

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Slide 9

**Two Roles of Supervisor**

- **Fill out the Self-Assessment Inventory**
- **Instructions:**  
For each of the roles and corresponding skills, please assess your strengths as you perceive them. In addition, answer the question, “Does your culture impact your skills in this area?”, by circling **Yes** or **No** at the far right. (Culture is defined however you define it for yourself.)

In the handouts are the “Four Supervisory Roles: Self Assessment Inventory.” Explain to trainees that these are some of the skills or “competency” that are usually associated with the roles of being a supervisor. Ask trainees to turn to the Inventories for “Teacher” and “Service and Support.”

**Instructions:**

Teacher and the Services and Support Inventories: for each of these roles and corresponding skills, please assess your strengths as you perceive them. In addition, answer the question, “Does your culture impact your skills in this area?” by circling **Yes** or **No** at the far right. (Culture is defined however you define it for yourself.)

This tool can serve as a “pre-test” as well as to introduce the skill areas.

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Slide 10

**Coaching Mentoring and Training**

- Find a partner. Using the self – assessments, discuss the most important skills that you see in providing teaching, coaching and mentoring to staff.
- Discuss the best ways that you have experienced them being done from your own life experience and discuss how you might practice these skills in developing your unit staff.

**Activity**

Ask the trainees to find a partner and do the above activity. After they are done, ask trainees to share with the larger group any great ideas or surprises that came from their discussion around the most important skills that a supervisor must have to be a good teacher and supporter to enhance the learning, professional development of staff and retention.


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Slide 11

Introduce the concepts of Pedagogy and Andragogy. Explain that they have made up the foundation of teaching theory throughout its growth. The term Andragogy was originally termed by a German teacher in 1833, Alexander Kapp to describe Plato’s educational theory, and it is associated with the concept that adults engage in continuing

### Pedagogy & Andragogy

- Pedagogy – Greek  
 “paid” = child  
 “agogus” =leader  
 of
- Andragogy – Greek  
 “andra” =Adult  
 related  
 “agogus” =leader  
 of



education throughout their lives. However, it is the work of Professor Malcom Knowles from Boston University in the 1980’s that really associated Andragogy with **self-directed learning** by people of any age as contrasted with “**teacher**”-directed learning.

Review concepts of self-directed v. teacher-directed learning, Slides 10 – 12.

#### Slide 12

Aspect	Pedagogy	Andragogy
<b>Self-Concept</b>	Dependent	Self-directed Self-motivated
<b>Experience</b>	Of little worth	Rich resource
<b>Readiness</b>	Biology/ Chronological	Applicability to tasks
<b>Time Perspective</b>	Postponed application	Immediate application

#### Slide 13

Aspect	Pedagogy	Andragogy
<b>Orientation to learning</b>	Subject centered	Problem centered
<b>Climate</b>	Formal authority competition	Mutual respect/ collaboration
<b>Planning</b>	By teacher	Mutual via needs assessment
<b>Diagnosis of needs</b>	By teacher	Mutual via feedback

#### Slide 14

Aspect	Pedagogy	Andragogy
<b>Formulation of Objectives</b>	By teacher	Mutual via needs assessment
<b>Design</b>	Logic of subject matter	Sequenced by application to problems
<b>Activities</b>	Transmittal techniques	Experiential inquiry/ engagement
<b>Evaluation</b>	By teacher	Mutual measurement of different aspects

#### Slide 15

### Activity and handout

Explain that teaching is done on a continuum

**What Is Your Teaching Style?**

- When you are teaching your staff on the continuum between pedagogy and andragogy where are you most comfortable?
- Consider:
  - Your and staff's roles
  - Climate
  - Diagnosis of needs

between Pedagogy and Andragogy. Different material and different goals for training can call for using more or less of self-directed learning. We all have preferences for how we like to teach and organizations do too.

### Learning point

Ask the trainees to take a moment to think about their county(ies) and what happens when a new policy comes out. How is it done? Is there a memo that comes out with the new policy written up for staff to follow (teacher directed)? Or when a directive comes to the attention of your agency, are there committees set up between all levels of the organization to discuss the new directive and who and how it will affect the agency? The policy is then developed by “committee.” This is self-directed. Or is it somewhere in between?


Ask the trainees to take out the “What is YOUR Teaching Style on the Continuum of Pedagogy and Andragogy” handout. Ask them to find a partner to work with. Discuss the elements of Pedagogy and Andragogy and how these concepts might help with teaching staff. After they have filled out the handout, ask them to share with their partner where they fall on the continuum in regards to:

- Experience
- Climate
- Time Perspective
- Self-Concept
- Diagnosis of Needs
- Evaluation

At the end of the exercise ask if anyone would like to share how these concepts might be helpful in teaching staff. If you have many responses chart them on a tear sheet.

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## Slide 16



**Things to Know about Adult Learning**

- Test Your Knowledge of Adult Learning

1. Circle True or False

- Let's Discuss


Ask trainees to fill out the Test your Knowledge of "Adult Learning Handout."

### Learning point

When they have finished, review the answers with them highlighting relevant points using the "Test your Knowledge of Adult Learning Answer Key."

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## Slide 17



**More Adult Learning Facts**

- What is **in it for me?**
- Make **me** feel **important** about myself.
- You can change people's minds with new information; but they will only **change their behavior** when they **feel** the need to change.

Discuss additional principles of adult learning and highlight how using these principles motivates adult learners.

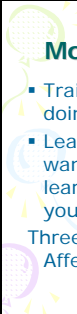
### Learning point

Discuss a few more adult learning facts:

- Adult learners are busy and they want to apply knowledge to their own life needs right away: They operate from the notion of "What is **in it for me?**"
- Adult learners like to be "really right." They like to be boosted. They operate from the notion: "Make **me** feel **important** about myself."
- You can change people's minds with new information; but they will only **change their behavior** when they **feel** the need to change (**Affective Domain**)
- Trainees are learning what they are doing. **Give them a job to do (Psychomotor Domain)**
- Learners want to learn what they want to learn when they want to learn it. The **teachable moment** is your best training opportunity. (**Cognitive Domain**)

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## Slide 18



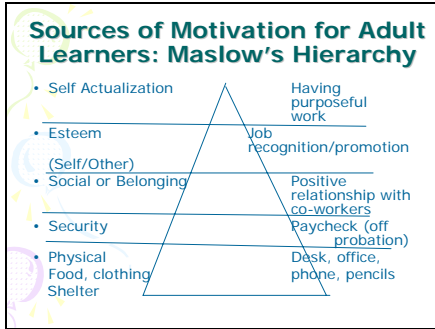
**More Adult Learning Facts**

- Trainees are learning what they are doing...**Give them a job to do.**
- Learners want to learn what they want to learn when they want to learn it. The **teachable moment** is your best training opportunity.

Three domains of learning: Cognitive, Affective and Psychomotor

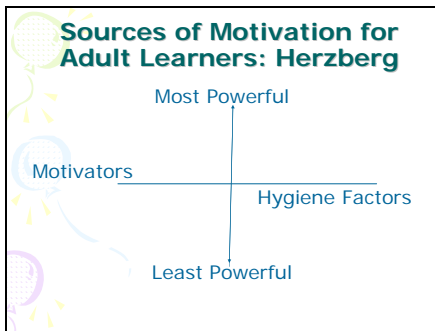
Discuss the three domains of learning: cognitive, affective and psychomotor. Training needs to hit all three for training to be effective.

Slide 19

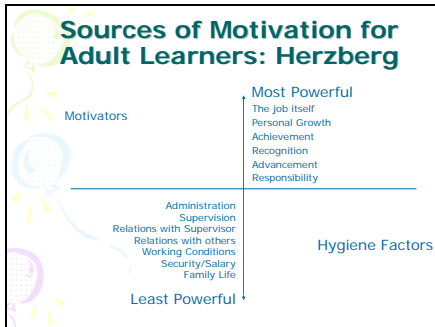


Have a discussion about what motivates people around work. Begin with a discussion of Maslow's Hierarchy to highlight how our needs build on each other and become more specialized and self-actualizing as you go up the pyramid (Slide 18). Discuss how Herzberg took this notion further by breaking the pyramid in two and saying that you have to have the things in the bottom half to even begin to motivate people to grow and to change (Slide 19) but that they are the least motivating for people. He went further to say that once you have the "hygiene" factors on the bottom of the pyramid in place then the top of the pyramid motivators can be applied and they have a lot of "bang for the buck." They are very motivating (Slide 20).

Slide 20



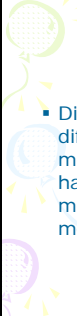
Slide 21



Slide 22

**Activity**

Have flip charts with blank paper at every table. Have colored pens on each of the tables. Ask the group who their leaders are again. Tell the leaders that they can either retain leadership or delegate it to someone else. Ask



### Supervisor Teaching Opportunities

- Discuss in your groups all of the different processes and “teachable, motivational moments” that you have with staff to provide motivation, education, leadership, mentoring. Chart them.

the new leaders to promote a scribe and a presenter for this process. Ask the groups to list all of the different teaching opportunities that they have throughout their day and work week to teach staff or support the teaching of staff. Ask the scribe to chart their answers on the flip chart. Give examples, e.g., a regular unit meeting, individual supervision, etc.

After they have discussed and charted, ask each group to present their ideas, letting them know if another group has already presented an idea, they do not need to say it again. Have each group report out. If there is a very large group, do not use the flip charts. Ask the scribe to use paper and request ideas from the larger group after they have finished the discussion.

### Learning point

Supervisors have many opportunities throughout the course of the day to enhance the professional development of staff.

### Slide 23



### Examples of Opportunities

- Regularly scheduled one-on-one supervision
- Unit meetings
- Open door policy
- Formal training classes
- Modeling – you attend training, sharing when return
- Evaluations
- Editing work, court reports
- Floor supervision
- Debrief when SW comes in from field/court
- Present at unit meeting
- Put on committees

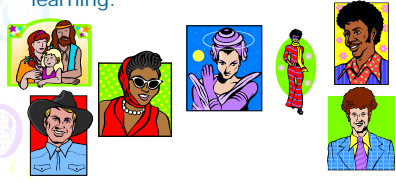
Review any opportunities that they might have missed. If they did a thorough job, skip this slide.

- Regularly scheduled one-on-one supervision
- Unit meetings
- Open door policy
- Formal training classes
- **Modeling – you attend training, sharing when return (important point to make)**
- Evaluations
- Editing work, court reports
- Floor supervision
- Debrief when SW comes in from field/court
- Present at unit meeting
- Put on committees

Slide 24

**Learning Styles**

- A learning style is a person's consistent way of responding to and using stimuli in the context of learning.



Briefly discuss learning styles and the VAK.

- Carl Gustav Jung was one of the most influential modern behavioral theorists.\*
- In 1921, Jung published "Psychological Types" which described four psychological functions: *thinking, feeling, sensation* and *intuition*.\*
- Jung also classified these four types further by calling them either *introverted* or *extroverted*.
- From this work, many instruments have been developed to help us understand how we prefer to relate to the world around us and to new information coming our way.
- **Visual Learners** – Graphics, images, memos, e-mail, evaluations, written notes
- **Auditory Learners** – voicemail, discussions in supervision, floor supervision, telephone
- **Kinesthetic Learners** – taking notes, participating in unit meetings, committees, written assignments

Slide 25

**Learning Styles**

- Carl Gustav Jung was one of the most influential modern behavioral theorists.
- In 1921 Jung published "Psychological Types" which described four psychological functions: *thinking, feeling, sensation* and *intuition*.
- Jung also classified these four types further by calling them either *introverted* or *extroverted*.
- From this work many instruments have been developed to help us understand how we prefer to relate to the world around us and to new information coming our way.

Slide 26

**Different People Learn in Different Ways – How We Like to Take in Information**

- **Visual Learners** – Graphics, images, memos, e-mail, evaluations, written notes
- **Auditory Learners** – voicemail, discussions in supervision, floor supervision, telephone
- **Kinesthetic Learners** – taking notes, participating in unit meetings, committees, written assignments

**NOTE: At this point any evidence-based learning style tool can be used for this portion of the curriculum, as long as it covers the learning points:**

- \*People have different learning styles.
- \*Trainees discover their own learning style.
- \*How to motivate learners with different learning styles to promote the professional learning and development of staff.

Please see handout for trainers only  
"Comparison of Instruments to Measure Personality Preferences and Learning Styles"  
(Appendix A).

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## Slide 27

**Kolb Learning Style Inventory**

- Describes the way you learn and how you deal with ideas and day to day situations. It measures the way that you like to learn in specific settings.
- Think of a situation that you are currently in where you are learning.
- Instructions Page 2

## Kolb Learning Style Inventory

Have trainees fill out the Kolb Learning Style Inventory

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## Slide 28

**Learning Styles**

Strategies for Working with staff with other learning styles:

- Diverging – sensitive to people’s feelings, values; listening with an open mind
- Assimilating – Organize information, know and test the facts, build conceptual models
- Converging – new ideas, creating new, choosing the best practical solution, setting goals, making decisions
- Accommodating – Seek new opportunities, let them influence and lead others, be personal, people

Using the Kolb Learning style inventory book, briefly discuss the different learning styles.

### Activity

Ask trainees to get into groups of like learning styles. Give each group a large piece of poster board and tell them to imagine that the group knows nothing about their learning style. Ask trainees to make a poster to “advertise their learning style.” Their poster needs to teach others about their learning style and how to best motivate their learning style. Let them know that they will have the opportunity to make a presentation of their advertisement to the larger group.

Ask each group to present their advertisement for their learning style.

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## Slide 29

**Let’s Use What We Know**

- 4 different case examples for a new social worker in your unit.
- As a group discuss your employee and based on their learning style develop a learning plan for them to develop their skills in your unit.
- Consider: What are the strengths of their learning styles and what is the best way to utilize them in your plan to make sure that learning happens. What are the challenges of their learning styles and how do you put a plan together that assists these areas as well.

Ask the groups who their current leaders are. Give the leaders the opportunity to remain the leaders or to delegate that responsibility. Ask the new leaders to promote someone to scribe and to present.

### Activity with two handouts

- Handout 1 – “Individual Learning Plan”
- Handout 2 – “Employee Scenarios”

Direct trainees to the two handouts. Ask each group to work on one scenario only. Give each

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table one assigned scenario, either: Andy, Coleenia, Kate or Darian.

Ask each table to read over their scenario and given everything that they know about the different learning styles, the principles of adult learning, motivational tools for motivating staff and all of the opportunities that they have throughout the day and weeks to offer teaching and support to staff; using the “Individual Learning Plan” (and they can use just one per group) discuss at least one skill area that they would want to work on with the employee scenario. Write down the skill area(s) and the competencies for that person’s skill area. Be behaviorally descriptive: How would you know that they had developed the skill – what would it look like? Then, **taking into account the employee’s learning style**, write down at least one specific teaching action that you would take to support the person in developing these skills.

At the end of the activity, ask the presenter to give a brief summary of their employee (including the employee’s learning style), present one of the learning needs that the group came up with, the teaching action that goes with that learning need and why they picked that learning action given the person’s learning style.

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Slide 30

**Transfer of Training**

- “the effective and continuing application, by trainees to their jobs, of the knowledge and skills gained in training – both on and off the job”

Broad and Newstrom

It is estimated that American business and industry annually spend up to \$100 billion (direct and indirect costs) on training and development; **not more than 10%** of these expenditures result in transfer to the job.

Discuss the importance of the transfer of training, from an economic perspective. Discuss how transfer of learning builds the capacity of the agency, and can keep employees happy fostering staff retention etc.

Definition of the transfer of training:  
“The effective and continuing application, by trainees to their jobs, of the knowledge and skills gained in training – both on and off the job”

(Broad and Newstrom)

It is estimated that American business and industry annually spend up to \$100 billion (direct and indirect costs) on training and development; **not more than 10%** of these expenditures result in transfer to the job.

Slide 31

**Roles in the Training Process**

Transfer of Learning	Before	During	After
Participant			
Supervisor			
Trainer			

Discuss the importance that managers and supervisors play in the process of transfer of training. Refer each person to the handout of the grid of transfer of training. Ask them to use numbers 1 through 9 in the boxes to denote who plays the most crucial part in the transfer of learning process before, during and after training (warn them that they may want to use a pencil). There is one number per box.

Slide 32

**Transfer of Learning**

Transfer of Learning	Before	During	After
Participant	5	6	7
Supervisor	1	8	3
Trainer	2	4	9

**Learning point**

Let trainees see how important supervisors and managers are to the process. Let them fill in the right numbers.

Slide 33

**Are You Ready for Some Football?**

- Change or transfer occurs when equilibrium is disrupted. An existing field of forces is changed by increasing transfer driving forces or by decreasing transfer restraining forces.

\*Lewin (1951) suggested a simple approach to change, which involves the interaction between two opposing sets of forces. Change, or transfer in this discussion, occurs when equilibrium is disrupted. An existing field of forces is changed by increasing transfer driving and/or decreasing transfer restraining forces. The number and strength of driving and restraining forces will determine if transfer occurs, as well as the extent of transfer. If the strength of the total number of transfer driving forces is greater than the restraining forces, transfer will occur. If the total strength of the restraining forces is greater or equal to the driving forces, transfer

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will not occur (Broad & Newstrom, 1992; Curry, 1997, Curry, 2001; Curry et al., 1994).

### **Activity**

This learning exercise uses the game of football as a metaphor to illustrate the transfer process. For example, one could imagine several training trainees on the 50-yard line of a “football field” (transfer field). Transfer driving and restraining before, during, and after training affect the extent of transfer (yardage gain or loss) of each trainee. In other words, there are three periods of play on the transfer field (before, during, and after). Even though the trainees attend the same training workshop, they may have substantially different experiences on the transfer field. Individual characteristics interact with unique environmental events that result in forward or backward movement on the field. For example, one trainee may meet with his/her supervisor prior to the training to discuss training relevance and potential applications. As a result of this meeting, this trainee probably has an increased learning and application readiness. The trainee will probably move forward on the football/transfer field (transfer yardage gain). Other trainees may have different experiences prior to attending training. Some will move forward and others backward on the field. \*So, even before a trainee comes to training (s)he may have a greater or lesser transfer potential due to driving and restraining which have already occurred. The total strength of these forces before, during, and after training will affect the amount of transfer (position on the field at the end of the game).

### **The Learning Exercise (The Transfer Field)**

#### **Goals**

- 
1. Visually illustrate transfer driving and restraining forces that affect trainees before, during, and after training.
  2. Demonstrate the impact of action and inaction of key individuals in the learning and transfer process.
  3. Recognize reasons for lack of transfer of learning from the workshop to the workplace.
  4. Provide transfer intervention suggestions for critical factors at critical times.

### Group size

A minimum of three trainees, and a maximum of 60 (possibly more if the room permits)

### Time required

The time required depends on whether the trainer intends to use the exercise in support of other training on transfer or as a stand-alone demonstration and discussion of transfer forces and barriers. The exercise requires 30 minutes to complete.

### Materials

- **Forty-five 5 X 8 inch index cards.**  
**Following are suggestions for what to write on the cards**
- Nine sheets of paper
- One marker
- Scissors and tape

### Physical setting

Space large enough for at least three people to freely move from one end of the room to the other (approximately 6 ft. by 15 ft.).

Additional space will be needed for the

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remainder of the training group.

### Process

1. Prior to the training, cut and tape the “driving and restraining forces” statements to index cards.
2. With a marker, number each of the sheets of paper to represent yard lines on a football field (10, 20, 30, 40, 50, 40, 30, 20, 10). You may also want to tape up a sign at eye level that says “Transfer Hall of Fame.”
3. Introduce the activity and explain that you are going to use the game of football as a metaphor to illustrate the transfer of learning process. Explain that there are three teams and ask for volunteers/players (You may ask each of your teams to select the “best” representative from the teams. Explain the job description of the volunteers/players. The requisite skills are that they must be able to stand and take small steps forward and backward.
4. Have the three volunteers/players stand on the 50 yard line. If possible, ask the team members to stand around the players in a show of support.
5. Explain to the group that there are driving and restraining forces that occur before, during, and after training that affect transfer of learning. State the group is going to explore the transfer of learning process. Mention that there are factors that affect transfer even before training occurs and that you are going to explore some of those.
6. Randomly shuffle the “before” cards and allow one of the members from team number one to select a card. Ask them to read the card in their best trainer voice. Ask the volunteer/player

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from team one to move forward or backward according to what is read from the card.

7. Ask a member of team two to select and read a card. Continue the process until all of the before cards have been read.
8. Ask the trainees to comment on what they have observed up to this point. Ask them to identify some of the critical factors involved in the “before” stage. Ask them to notice that the players are at different places on the field and they have not even come to training yet (different transfer potential). Ask the trainees to identify other factors/forces that can affect transfer prior to training.
9. Repeat the process with the “during” and “after” cards. You may want to ask the teams if they want to send in a substitute player/representative and give the original representative a break.
10. When all of the “after” cards are completed, ask the volunteers to comment on how it felt to go through the learning and application process (moving forward and backward). Ask the other trainees their comments. Point out to the group the differences in the extent of transfer that occurred among the different workers who received different experiences. Mention that this is similar to the real world of training and application. Ask them to identify critical factors who were involved in the transfer process. Try to generate ideas to increase the transfer driving forces and to decrease the transfer restraining forces in the transfer field. Also, highlight that quantitative approaches to evaluation of transfer generally focus on the extent of transfer (distance on the field) while qualitative approaches are often used to explore the

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process of transfer (factors on the cards affecting the distance).

11. After the exercise, provide a copy of the transfer driving and restraining forces for the trainee's future reference.

### Variations

1. **During the exercise, you may want to involve the audience/trainees to a greater extent by asking them to determine the forward gain or backward loss of "yardage" after the trainees read each statement.**
2. You may decide to add statements that contain critical factors or forces that specifically pertain to your situation.

### Card statements

#### Driving and restraining forces before formal training

- Trainee hears negative messages about training before attending (e.g., "You can't use the training on the job"). ***Go back 5 yards.***
- Trainee thinks training is a vacation away from the job. Trainee does not come prepared to learn. ***Go back 3 yards.***
- Trainee does not have a choice in attending the training. Trainee is signed up by the training department. Supervisor is not involved in the decision either. ***Go back 10 yards.***
- Trainee does not see the connection between training and increasing work effectiveness with clients. ***Go back 3 yards.***
- Trainee is the only one sent from his/her work team for team training. ***Go back 4 yards.***

- 
- No one from the supervisory or administrative level has ever attended the training. *Go back 5 yards.*
  - Supervisor notifies trainee about workshop 1 hour before the training starts. *Go back 6 yards.*
  - Training developed by training department without involvement from line or supervisory staff. The training is a special interest to the administrator. **Stay where you are.**
  - Training developed with input from all levels of staff (line, supervisory, administrative, training personnel, clients). *Move forward 10 yards.*
  - Accurate needs assessment is performed (right trainee to the right training at the right time). *Move forward 10 yards.*
  - Supervisor meets with trainee before the workshop to discuss training expectations. *Move forward 4 yards.*
  - Supervisor engages the trainee before the workshop to think about level of self-competence pertaining to the upcoming workshop. **Move forward 4 yards.**
  - Trainee makes a plan with supervisor and co-workers to cover cases while in training. *Move forward 1 yard.*
  
  - Importance of training to job effectiveness and subsequent promotions is conveyed to all newly hired persons. *Move forward 2 yards.*
  - Work unit goes as a team to training prepared to bring new ideas back to the unit. *Move forward 15 yards.*
  - Trainer meets before training with line workers, supervisors and administrator to help make training as relevant as possible. *Move forward 5 yards.*

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### Driving and restraining forces **during** training

- Trainee comes to the workshop with specific cases/situations in mind. *Go forward 3 yards.*
- Trainer utilizes techniques that facilitate retention (relating information to what the workers already know, multimedia, observation and practice, attention getting techniques, mnemonic devices). *Go forward 3 yards.*
- Trainer stresses the importance of transfer at the beginning, middle and end of training. *Move forward 1 yard.*
- Trainer involves the workers and their supervisors in the action planning process. *Move forward 10 yards.*
- Trainer engages trainees to set three action plan objectives to apply new ideas on the job. *Move ahead 4 yards.*
- Trainer helps worker identify barriers and facilitative forces to their action plans. *Go ahead 3 yards.*
- Trainer provides tools (handouts, visual aids, reminder cards) that the workers can take with them to the job (office, car, client homes). *Move ahead 2 yards.*
- Trainer brings the work environment into the training (e.g., uses actual cases of workers, uses agency and state forms, brings in a client willing to be interviewed). *Move ahead 6 yards.*
- Trainer periodically stops the training and asks trainees to think about how they will use the information discussed up to that point. Trainer also asks workers to cognitively rehearse the application of new skill in the work environment. *Move ahead 5 yards.*
- Due to “emergencies,” supervisor interrupts the training session to

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conference with workers. *Move back 5 yards.*

- Trainer inflexibly adheres to workshop agenda without adjusting to specific case examples generated by trainees. Several workers are disruptive during the workshop. *Move back 2 yards.*
- Trainer is not able to relate personal expertise to child welfare practice. *Move back 4 yards.*
- Trainer points out the relationship of training to agency mission. *Move forward 1 yard.*

#### Driving and restraining forces **after** training

- Training personnel send a reminder notice about action plan to workers one week after training. *Move forward 2 yards.*
- Training personnel send a transfer survey to workers after the workshop to assess their transfer efforts. *Move ahead 3 yards.*
- Supervisor meets with worker within a week of training to review action plan. *Move ahead 5 yards.*
- Supervisor and worker make a plan of implementation for action plan, which includes ongoing review of action plan by worker and supervisor. *Move ahead 7 yards.*
- Worker formally provides an overview of the training for other staff in unit during the next unit meeting. *Move ahead 5 yards.*
- Supervisor arranges for worker to shadow another worker who has previously attended the training in an effort to observe implementation of workshop ideas. *Move ahead 6 yards.*
- Worker attends a “booster shot” review session of the training workshop one

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month after the workshop. *Move ahead 4 yards.*

- Worker attends an alumni meeting of previous workshop graduates who discuss applications of the training. *Move ahead 5 yards.*
- Agency provides a small bonus to workers who successfully complete the training and attend a “booster shot” review and application session. *Move ahead 5 yards.*
- Training personnel publish the names and stories of workers who apply the training to the job. *Move ahead 3 yards.*
- Supervisor provides immediate and intermittent reinforcement and support of worker transfer efforts after the workshop. *Advance 6 yards.*
- Co-workers provide reinforcement and support to worker upon application. *Move ahead 3 yards.*
- Trainee tries out new ideas but is not successful with first two clients. One client cusses at trainee and calls agency administrator to complain. *Move back 10 yards.*
- After the workshop, other workers convey to trainee, “If you want to survive in this business, you better forget about what you just learned; there is no time for it.” *Move back 6 yards.*
- After training, the worker is reassigned to a position where training is not emphasized. *Move back 10 yards.*

Note: This learning exercise was adapted with permission from: Curry, D. & Caplan, P. (1996). The transfer field: A training exercise. The Child and Youth Care Leader. 7, 28-30.

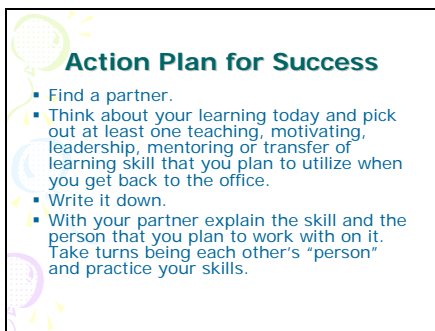
### Conclusion

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It has been suggested that the transfer field and TOTAL approach provides a basic, yet comprehensive model for transfer assessment and intervention. In addition, the described exercise can facilitate an understanding of the transfer of learning process by exploring transfer driving and restraining forces before, during and after training. The exercise actively involves trainees using visual, auditory, and kinesthetic modalities. Although research has not been conducted assessing the impact of the training exercise, training and development professionals in the human services across the country have stated that the exercise greatly contributes to an understanding of the transfer of learning process.

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#### Slide 34

A slide titled "Action Plan for Success" with a decorative background of colorful circles and lines. The text is as follows:

**Action Plan for Success**

- Find a partner.
- Think about your learning today and pick out at least one teaching, motivating, leadership, mentoring or transfer of learning skill that you plan to utilize when you get back to the office.
- Write it down.
- With your partner explain the skill and the person that you plan to work with on it. Take turns being each other's "person" and practice your skills.

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#### Activity

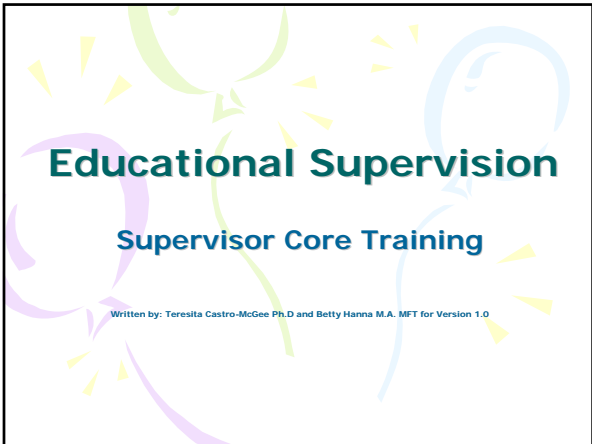
- Action Plan for Success
  - Find a partner
  - Think about your learning today and pick out at least one teaching, motivating, leadership, mentoring or transfer of learning skill that you plan to utilize when you get back to the office.
  - Write it down
  - With your partner explain the skill and the person that you plan to work with on it. Take turns being each other's "person" and practice your skills.

Closing – go back over learning points of the day, incorporating the goals that the trainees have on the needs assessment chart. Thank everyone for coming and ask them to please stay and complete their evaluation before they leave.

**TAB 8**

**Trainer's Supplements**

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# Educational Supervision

## Supervisor Core Training

Written by: Teresita Castro-McGee Ph.D and Betty Hanna M.A. MFT for Version 1.0

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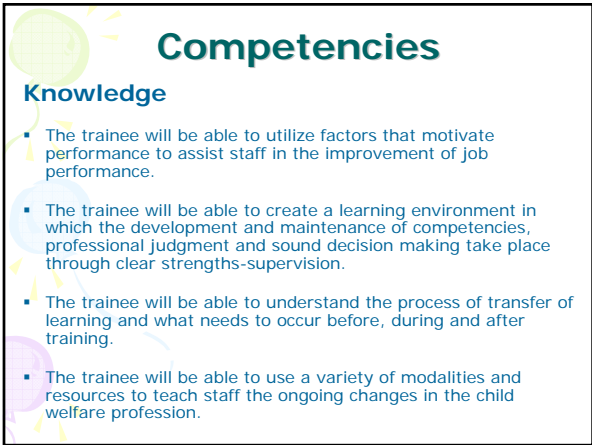
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# Competencies

## Knowledge

- The trainee will be able to utilize factors that motivate performance to assist staff in the improvement of job performance.
- The trainee will be able to create a learning environment in which the development and maintenance of competencies, professional judgment and sound decision making take place through clear strengths-supervision.
- The trainee will be able to understand the process of transfer of learning and what needs to occur before, during and after training.
- The trainee will be able to use a variety of modalities and resources to teach staff the ongoing changes in the child welfare profession.

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# Competencies

## Skill

- The trainee is able to assess staff readiness for learning.
- The trainee will be able to apply principles of adult learning.
- The trainee will be able to assist staff to transfer knowledge and skills learned through in-service training to their jobs.

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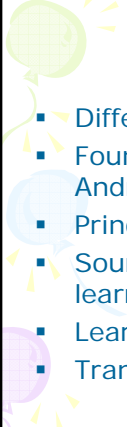
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## Agenda

- Different roles of supervision
- Foundations of adult learning: Andragogy v. Pedagogy
- Principles of adult learning
- Sources of motivation for adult learners
- Learning styles and learning plans
- Transfer of learning

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## 4 Roles of Supervisor

- **Administrative Role**
  - Procure resources
  - Provide leadership and direction
  - Establish and enforce rules and standards, policies and procedures
  - Establish and maintain boundaries
  - Adhere to prevailing societal laws
  - Create and maintain a team-based atmosphere

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## 4 Roles of Supervisor

- **Managerial Role**
  - Establish and maintain a communication system
  - Distribute the workload
  - Establish and clarify staff roles
  - Protect and maintain resources
  - Work within effective timeframes

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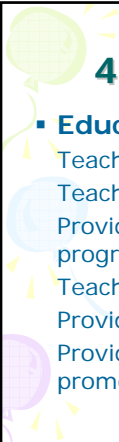
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## 4 Roles of Supervisor

- **Educational Role**
  - Teach values and belief system of agency
  - Teach skills
  - Provide and/or support educational program
  - Teach discipline and correction
  - Provide information about agency history
  - Provide coaching and mentoring to promote staff development

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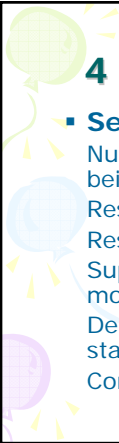
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## 4 Roles of Supervisor

- **Service and Support**
  - Nurture physical and personal well-being
  - Respect staff members
  - Resolve conflict among staff
  - Support all staff consistently in the way most suited to each person
  - Demonstrate empathy and concern for staff
  - Communicate with staff

\* Stephen Covey

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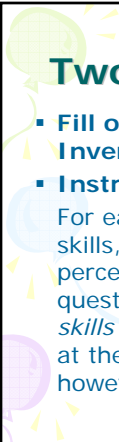
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## Two Roles of Supervisor

- **Fill out the Self-Assessment Inventory**
- **Instructions:**

For each of the roles and corresponding skills, please assess your strengths as you perceive them. In addition, answer the question, "*Does your culture impact your skills in this area?*", by circling **Yes** or **No** at the far right. (*Culture* is defined however you define it for yourself.)

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## Coaching Mentoring and Training

- Find a partner. Using the self – assessments, discuss the most important skills that you see in providing teaching, coaching and mentoring to staff.
- Discuss the best ways that you have experienced them being done from your own life experience and discuss how you might practice these skills in developing your unit staff.

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## Pedagogy & Andragogy

- Pedagogy – Greek  
 “paid” = child  
 “agogus” = leader of



- Andragogy – Greek  
 “andra” =Adult related  
 “agogus” = leader of




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## Elements of Adult Learning

Aspect	Pedagogy	Andragogy
<b>Self-Concept</b>	Dependent	Self-directed Self-motivated
<b>Experience</b>	Of little worth	Rich resource
<b>Readiness</b>	Biology/ Chronological	Applicability to tasks
<b>Time Perspective</b>	Postponed application	Immediate application

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Aspect	Pedagogy	Andragogy
<b>Orientation to learning</b>	Subject centered	Problem centered
<b>Climate</b>	Formal authority competition	Mutual respect/ collaboration
<b>Planning</b>	By teacher	Mutual via needs assessment
<b>Diagnosis of needs</b>	By teacher	Mutual via feedback

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Aspect	Pedagogy	Andragogy
<b>Formulation of Objectives</b>	By teacher	Mutual via needs assessment
<b>Design</b>	Logic of subject matter	Sequenced by application to problems
<b>Activities</b>	Transmittal techniques	Experiential inquiry/ engagement
<b>Evaluation</b>	By teacher	Mutual measurement of different aspects

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**What Is Your Teaching Style?**

- When you are teaching your staff on the continuum between pedagogy and andragogy where are you most comfortable?
- Consider:
  - Your and staff's roles
  - Climate
  - Diagnosis of needs

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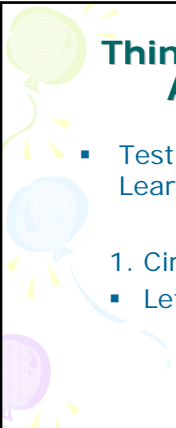
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### Things to Know about Adult Learning

- Test Your Knowledge of Adult Learning

1. Circle True or False

- Let's Discuss

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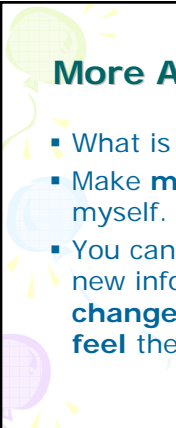
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### More Adult Learning Facts

- What is **in it for me?**
- Make **me** feel **important** about myself.
- You can change people's minds with new information; but they will only **change their behavior** when they **feel** the need to change.

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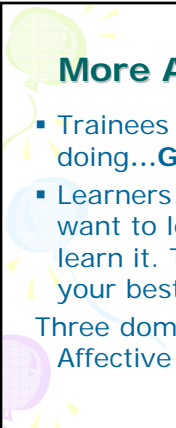
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### More Adult Learning Facts

- Trainees are learning what they are doing...**Give them a job to do.**
- Learners want to learn what they want to learn when they want to learn it. The **teachable moment** is your best training opportunity.

Three domains of learning: Cognitive, Affective and Psychomotor

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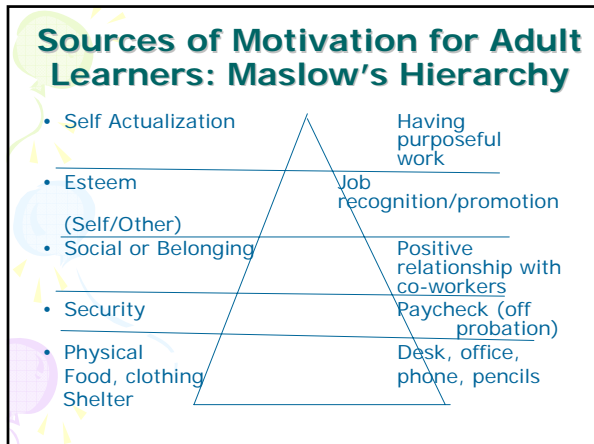
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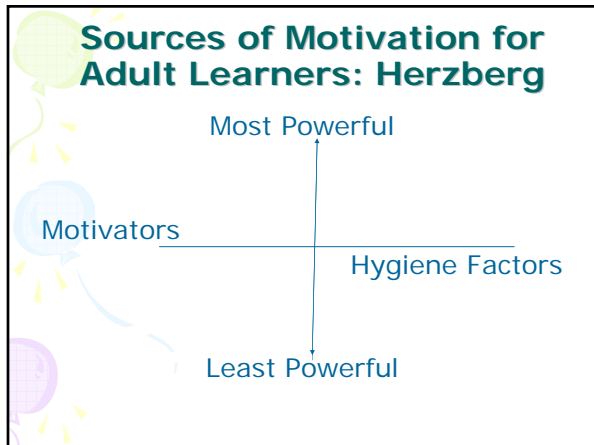
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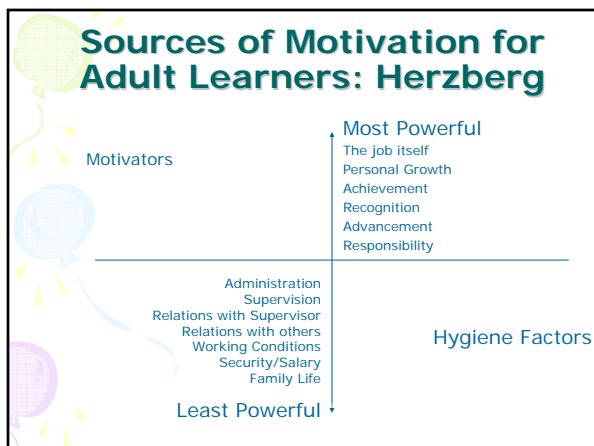
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## Supervisor Teaching Opportunities

- Discuss in your groups all of the different processes and “teachable, motivational moments” that you have with staff to provide motivation, education, leadership, mentoring. Chart them.

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## Examples of Opportunities

- Regularly scheduled one-on-one supervision
- Unit meetings
- Open door policy
- Formal training classes
- Modeling – you attend training, sharing when return
- Evaluations
- Editing work, court reports
- Floor supervision
- Debrief when SW comes in from field/court
- Present at unit meeting
- Put on Committees

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## Learning Styles

▪ A learning style is a person’s consistent way of responding to and using stimuli in the context of learning.




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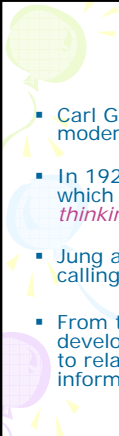
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## Learning Styles

- Carl Gustav Jung was one of the most influential modern behavioral theorists.
- In 1921 Jung published "Psychological Types" which described four psychological functions: *thinking, feeling, sensation* and *intuition*.
- Jung also classified these four types further by calling them either *introverted* or *extroverted*.
- From this work many instruments have been developed to help us understand how we prefer to relate to the world around us and to new information coming our way.

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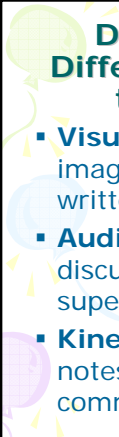
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## Different People Learn in Different Ways – How We Like to Take in Information

- **Visual Learners** – Graphics, images, memos, e-mail, evaluations, written notes
- **Auditory Learners** – voicemail, discussions in supervision, floor supervision, telephone
- **Kinesthetic Learners** – taking notes, participating in unit meetings, committees, written assignments

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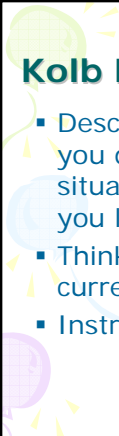
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## Kolb Learning Style Inventory

- Describes the way you learn and how you deal with ideas and day-to-day situations. It measures the way that you like to learn in specific settings.
- Think of a situation that you are currently in where you are learning.
- Instructions Page 2

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## Learning Styles

- Strategies for working with staff with other learning styles:

Diverging – sensitive to people’s feelings, values, listening with an open mind

Assimilating – Organize information, know and test the facts, build conceptual models

Converging – new ideas, creating new, choosing the best practical solution, setting goals, making decisions

Accommodating – Seek new opportunities, let them influence and lead others, be personal, people

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## Let’s Use What We Know

- 4 different case examples for a new social worker in your unit.
- As a group discuss your employee, and based on their learning style develop a learning plan for them to develop their skills in your unit.
- Consider: What are the strengths of his/her learning style and what is the best way to utilize them in your plan to make sure that learning happens? What are the challenges of this learning style and how do you put a plan together that assists these areas as well?

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## Transfer of Training

- “the effective and continuing application, by trainees to their jobs, of the knowledge and skills gained in training – both on and off the job”

Broad and Newstrom

It is estimated that American business and industry annually spend up to \$100 billion (direct and indirect costs) on training and development; **not more than 10%** of these expenditures result in transfer to the job.

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## Roles in the Training Process

Transfer of Learning	Before	During	After
Trainee			
Supervisor			
Trainer			

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## Transfer of Learning

Transfer of Learning	Before	During	After
Trainee	5	6	7
Supervisor	1	8	3
Trainer	2	4	9

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## Are You Ready for Some Football?

- Change or transfer occurs when equilibrium is disrupted. An existing field of forces is changed by increasing transfer driving forces or by decreasing transfer restraining forces.

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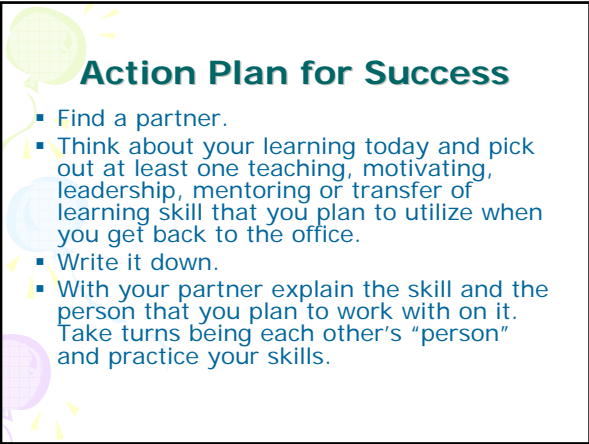
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**Action Plan for Success**

- Find a partner.
- Think about your learning today and pick out at least one teaching, motivating, leadership, mentoring or transfer of learning skill that you plan to utilize when you get back to the office.
- Write it down.
- With your partner explain the skill and the person that you plan to work with on it. Take turns being each other's "person" and practice your skills.

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# Test your Knowledge of Adult Learning

## Answer and Learning Point Key

1. T or F      If you “catch” your staff member in the act of doing something “right” and acknowledge it in some way it is likely that they will repeat that behavior. *True – Learners repeat behaviors that are rewarded.*
2. T or F      A policy memorandum given to staff to read is all that is necessary for all staff members to learn a new process. *False- Different people learn in different ways.*
3. T or F      What happens out in the field when social workers are working with families with intense crisis issues often creates long-lasting learning. *True – Events that are accompanied by intense emotions result in long-lasting learning.*
4. T or F      If you tell a staff member to do a new skill once they should be able to perform it without assistance. *False – Learners cannot master skills without repeated practice with relevant feedback. It often takes a person experiencing new information 7 times before it is learned completely.*
5. T or F      It is good for supervisors to go out into the field with new social workers, coaching and supporting them while they are working with the client, to facilitate learning. *True – Active responding produces more effective learning than passive listening or reading. And, learners master skills and knowledge at the level at which they are required to respond during the learning process.*
6. T or F      Asking social workers to mentor other social workers with less experience facilitates the learning of both and builds the capacity of the unit. *True - Learners master skills and knowledge at the level at which they are required to respond and practice during the learning process.*
7. T or F      It is important that new social workers recognize that child welfare is unlike any other job that they have ever had so they should listen to new information like a “blank slate” and not try to apply it to other experiences or jobs that they have had. *False – New learning should be linked and built upon the experiences of the learner. Adults learn by attaching new information to existing information. Also, learning is most effective when it is relevant to the learner’s life and work.*
8. T or F      Social workers learn best when supervisors tell them what they should do and how they should do it. *False – Most adult learners are self-directed learners.*

# Follow Your True Colors

## Personality Assessment

Please answer according to who you are, instead of who you want to be.

A	B	Select the one that best describes you:
		My friends would describe me as being more (a) logical, or (b) emotional.
		In my relationships, I tend to (a) expect my partner to know I love them without saying it, or (b) tell my partner "I love you."
		What is more important for you to have? (a) power, or (b) self-esteem
		I prefer a birthday card that is (a) clever and thought provoking, or (b) sentimental.
		"If there is a chance someone's feelings will be hurt by telling the truth, I will (a) tell the truth anyway, or (b) keep my opinion to myself or sugar coat the truth."
		Are you (a) analyzing this test? or (b) going with your feelings?
		When I travel, I like to (a) figure out what to do when I get there, or (b) have a preplanned itinerary.
		I often (a) break the rules, or (b) follow the rules.
		In my work tasks, it's important for me to have (a) change and variety, or (b) a set routine.
		When it comes to sex, I consider it (a) OK to discuss it publicly, or (b) too private to discuss.
		I'm usually (a) fashionably late, or (b) on time.
		I do most things (a) on the spur of the moment, or (b) with a plan in mind.
		I like to work with (a) my mind, or (b) my hands.

		When I make a decision, I (a) usually think about it, or (b) just do it.
		The kind of person I like to spend my time with (a) makes me think, or (b) is fun to be with.
		When you are attracted to someone, do you (a) take time to analyze the person, or (b) give your heart away in a moment?
		When I deal with others, I tend to act more like a (a) teacher, or (b) playmate.
		In school, I learned easier by (a) reading about it, or (b) doing it.
		Most of the time, I (a) question authority, or (b) assume authority is right.
		In a serious relationship, I prefer someone who would (a) be an intelligent companion, or (b) a practical mate.
		At work, it is more important for me to (a) be mentally challenged, or (b) have predictable situations.
		I take pride in being (a) a creative problem solver, or (b) a realistic decision maker.
		I prefer looking for (a) new solution, or (b) what has worked in the past.
		I often think about (a) future projects, or (b) the immediate task.
		The way I prefer to cheer up a sad friend is to (a) get them to talk about their feeling, or (b) take them out for a good time.
		Do you prefer to make a contribution to others by (a) inspiring them, or (b) entertaining them?
		In a relationship, it's more important for me to first have (a) emotional bonding, or (b) physical intimacy.
		At work, others would describe me as (a) a team player, or (b) the star of the team.
		When someone argues with you, is it more important to (a) make

		peace, or (b) confront them?
		When picking movies, I usually choose (a) a romantic story, or (b) an action thriller.
		I prefer to deal with (a) people-related issues, or (b) task-related issues.
		In a romantic relationship, I look for (a) a soul mate, or (b) a potential spouse.
		It's more important to (a) make others happy, or (b) follow the rules.
		I learn things better when they are (a) told as a heartfelt story, or (b) presented with facts.
		I usually buy clothes (a) because they make me feel good, or (b) for practical reasons.
		When I greet my friends, I prefer to (a) give a hug, or (b) shake hands.

Note. From <https://www.truecolorscareer.com/quiz.asp>

# Visual, Auditory and Kinesthetic Survey

Read each statement carefully. To the left of each statement, write the number that best describes how each statement applies to you by using the following guide:

1	2	3	4	5
Almost Never Applies	Applies Once In A While	Sometimes Applies	Often Applies	Almost Always Applies

Answer honestly as there are no correct or incorrect answers. It is best if you do not think about each question too long, as this could lead you to the wrong conclusion.

Once you have completed all 36 statements (12 statements in three sections), total your score in the spaces provided.

## Section One - Visual

- \_\_\_\_\_ 1. I take lots of notes and I like to doodle.
- \_\_\_\_\_ 2. When talking to someone else I have the hardest time handling those who do not maintain good eye contact with me.
- \_\_\_\_\_ 3. I make lists and notes because I remember things better if I write them down.
- \_\_\_\_\_ 4. When reading a novel I pay a lot of attention to passages picturing the clothing, description, scenery, setting, etc.
- \_\_\_\_\_ 5. I need to write down directions so that I may remember them.
- \_\_\_\_\_ 6. I need to see the person I am talking to in order to keep my attention focused on the subject.
- \_\_\_\_\_ 7. When meeting a person for the first time I notice the style of dress, visual characteristics, and neatness first.

- \_\_\_\_\_ 8. When I am at a party, one of the things I love to do is stand back and “people-watch”.
- \_\_\_\_\_ 9. When recalling information I can see it in my mind and remember where I saw it.
- \_\_\_\_\_ 10. If I had to explain a new procedure or technique, I would prefer to write it out.
- \_\_\_\_\_ 11. With free time I am most likely to watch television or read.
- \_\_\_\_\_ 12. If my boss has a message for me, I am most comfortable when she sends a memo.

Total For Visual \_\_\_\_\_ (note: the minimum is 12 and maximum is 60)

## **Section Two - Auditory**

- \_\_\_\_\_ 1. When I read, I read out loud or move my lips to hear the words in my head.
- \_\_\_\_\_ 2. When talking to someone else I have the hardest time handling those who do not talk back with me.
- \_\_\_\_\_ 3. I do not take a lot of notes but I still remember what was said. Taking notes distracts me from the speaker.
- \_\_\_\_\_ 4. When reading a novel I pay a lot of attention to passages involving conversations, talking, speaking, dialogues, etc.
- \_\_\_\_\_ 5. I like to talk to myself when solving a problem or writing.
- \_\_\_\_\_ 6. I can understand what a speaker says, even if I am not focused on the speaker.
- \_\_\_\_\_ 7. I remember things easier by repeating them again and again.
- \_\_\_\_\_ 8. When I am at a party, one of the things I love to do is talk in-depth about a subject that is important to me with a good conversationalist.

- \_\_\_\_\_ 9. I would rather receive information from the radio, rather than a newspaper.
- \_\_\_\_\_ 10. If I had to explain a new procedure or technique, I would prefer telling about it.
- \_\_\_\_\_ 11. With free time I am most likely to listen to music.
- \_\_\_\_\_ 12. If my boss has a message for me, I am most comfortable when she calls on the phone.

Total For Auditory \_\_\_\_\_ (note: the minimum is 12 and the maximum is 60)

## Section Three – Kinesthetic

- \_\_\_\_\_ 1. I am not good at reading or listening to directions. I would rather just start working on the task or project at hand.
- \_\_\_\_\_ 2. When talking to someone else I have the hardest time handling those who do not show any kind of emotional support.
- \_\_\_\_\_ 3. I take notes and doodle but I rarely go back and look at them.
- \_\_\_\_\_ 4. When reading a novel I pay a lot of attention to passages revealing feelings, moods, action, drama, etc.
- \_\_\_\_\_ 5. When I am reading, I move my lips.
- \_\_\_\_\_ 6. I will exchange words and places and use my hands a lot when I can't remember the right thing to say.
- \_\_\_\_\_ 7. My desk appears disorganized.
- \_\_\_\_\_ 8. When I am at a party, one of the things I love to do is enjoy the activities such as dancing, games, and totally losing myself in the action.
- \_\_\_\_\_ 9. I like to move around. I feel trapped when seated at a meeting or a desk.
- \_\_\_\_\_ 10. If I had to explain a new procedure or technique, I would prefer actually demonstrating it.
- \_\_\_\_\_ 11. With free time I am most likely to exercise.
- \_\_\_\_\_ 12. If my boss has a message for me, I am most comfortable when she talks to me in person.

Total For Kinesthetic \_\_\_\_\_ (note: the minimum is 12 and maximum is 60)

## Scoring Procedures

Total each section and place the sum in the blocks below:

<b>VISUAL</b>	<b>AUDITORY</b>	<b>KINESTHETIC</b>
Number of points: _____	Number of points: _____	Number of points: _____

The area in which you have the highest score represents your best learning style. Note that you learn in ALL three styles, but you normally learn best using one style.

Built January 1998. Updates October 24, 2000.

Learning Styles

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<http://www.nwlink.com/~donclark/hrd/vak.html>

Note. From <https://www.nwlink.com/~donclark/hrd/vak.html>

# Comparison of Instruments to Measure Personality Preferences and Learning Styles

During the Early 1900's, Carl Jung established a field identifying distinct personality patterns. Many theorists have since broken these patterns into categories in an effort to make them easy to understand and applicable in different situations. The Myers Briggs Type Indicator (MBTI) is the inventory that most closely assesses Jung's personality patterns; however, it is very focused on the individual profile across 4+ categories of preference. Although it is a wonderful tool, it is too comprehensive for a discussion of a learning inventory; therefore it is not evaluated here. The following profiling instruments have ties to Jung's work in this field but use only two or three of his dimensions except for the VAK.

	True Colors	VAK	Kolb Learning Style Inventory	DISC Dimensions of Behavior Personal Profile System
<b>Measures</b>	True Colors is a personality system that has been around since 1979 and is modeled as a graphical presentation of both Keirsey's Temperament and the MBTI. The assessment asks you to finish 36 statements. The results are expressed in four different "color" types.	The VAK learning style uses the three main sensory receivers—vision, auditory and kinesthetic (movement) to determine the dominant learning style.	The Learning Style Inventory is a 12-item assessment tool developed by Davis A Kolb, Ph.D. Based on Experiential Learning Theory, it identifies preferred learning styles, and explores the opportunities different styles present for: <ul style="list-style-type: none"> <li>▪ Problem solving</li> <li>▪ Working in teams</li> <li>▪ Resolving conflict</li> <li>▪ Communicating at work</li> <li>▪ Communicating at home</li> <li>▪ Considering a career</li> </ul>	The DISC personal profile system is a 28-word inventory that asks the test taker to pick from four word groupings preferences and non-preference of the sets of words. It uses four primary dimensions of behavior to describe how a person prefers to be treated in different environments (i.e. work, home, social etc.). Often used in work environments to build understanding, better communication and positive relationships.

	<b>True Colors</b>	<b>VAK</b>	<b>Kolb Learning Style Inventory</b>	<b>DISC Dimensions of Behavior Personal Profile System</b>
<b>What it does</b>	<p>This program helps identify the four basic temperaments using a mixture of Jung’s dimensions. The Orange and Gold use Sensing v. Intuitive and Perceiving v. Judgment, and Blue and Green use Sensing v. Intuitive and Feeling v. Thinking.</p> <p><b>Orange</b> – Sensing/Perceiving  <b>Gold</b> – Sensing/Intuitive  <b>Blue</b> – Intuitive/Feeling  <b>Green</b> – Intuitive/Thinking</p>	<p>Focuses on biological reactions using preferred dominant senses.</p> <p><b>Visual</b>  <b>Auditory</b>  <b>Kinesthetic</b></p>	<p>The four Learning Styles are:</p> <ul style="list-style-type: none"> <li>▪ <b>Diverging:</b> combines preferences for experiencing and reflecting</li> <li>▪ <b>Assimilating:</b> combines preferences for reflecting and thinking</li> <li>▪ <b>Converging:</b> combines preferences for thinking and doing</li> <li>▪ <b>Accommodating:</b> combines preferences for doing and experiencing</li> </ul>	<p>Uses four primary dimensions of behavior:</p> <p><b>Dominance</b> which combines preferences for Thinking or Being Task-oriented and Extroverted  <b>Influencing</b> which combines preferences for Feeling or People-oriented and Extroverted  <b>Steadiness</b> which combines preferences for Feeling or People-oriented and Introverted  <b>Conscientiousness</b> which combines preferences for Thinking or Task-oriented and Introverted</p>
<b>Where it comes from</b>	<p>This inventory is based on MBTI and the Keirsey’s Temperament. Both apply Jung’s personality patterns; however, True Colors uses MBTI’s dimension of Sensing v. Intuitive (N) instead of the Introversion v. Extroversion dimension that is used in the Kolb and the DISC.</p>	<p>Does not take into account the way the brain prefers to process information, i.e., think, solve problems and remember information</p>	<p>Uses Piaget and J.P. Guilford’s terms. Applies similar concepts of Jung’s Introversion v. Extroversion and Thinking v. Feeling but focuses them on learning processes</p>	<p>Based on research of William Moulton Marston who extensively researched and validated the tool. Based on Jung’s concepts of Introversion v. Extroversion and Thinking v. Feeling. Used worldwide</p>

	<b>True Colors</b>	<b>VAK</b>	<b>Kolb Learning Style Inventory</b>	<b>DISC Dimensions of Behavior Personal Profile System</b>
<b>Instrument</b>	<p>The 36 statement personality assessment contains partial statements with a choice to pick one of two answers to finish the statements that best describes the test-taker.</p> <p><i>Author's note: The author took the assessment two times in the same week. Results of the author's test-taking were consistent with the author's MBTI and DISC profiles. However, the MBTI and DISC profiles did not fluctuate as did this one.</i></p> <p>Cost: The inventory is available free as a web-based instrument; however, the materials to explain the findings and different dimensions come in various forms and have a cost.</p>	<p>Short simple inventory in various forms and sizes of a person marking their level of preference for different statements and tallies them at the end.</p> <p><i>Author's note: The author took this test. Results were consistent with her experience of how she prefers to learn.</i></p> <p>No Cost.</p>	<p>12 partial sentences about learning that ask test taker to rate the four different following descriptions that finish the sentences based on how well they describe the test-taker. In booklet form with descriptions of the learning styles and activities to work with the styles.</p> <p><i>Author's note: The author took this test. Results were consistent with her MBTI and DISC profile indicators.</i></p> <p>Approximate cost: \$85.00 for 10 booklets</p>	<p>Inventory consists of 28 groupings of four words. Focus in on how people relate to the environment based on their style preference and how to best communicate and support people with different styles. Accompanied by a booklet that contains the inventory, descriptions of the four styles and advanced combinations for individual styles.</p> <p><i>Author's note: The author took this test. Results were consistent with those of the Kolb and the MBTI.</i></p> <p>Cost: between \$10.00 - \$15.00 per booklet</p>

<b>Summary</b>	This tool was specifically developed to be a graphical presentation of part of the MBTI. It uses the Intuitive v. Sensing dimension which is different from the other inventories, like the Kolb and the DISC. It has been used for school age children and for career development.	Good introduction to begin to understand that people learn in different ways. Too simple to understand the whole of a person's style. Recent research suggests that this instrument cannot be supported by research.	Similar inventory to the DISC, which also uses a form of Jung's preference scales. However, the emphasis of this inventory and how the material in the booklet is laid out is on learning. It says that it is a statistically proven and reliable tool. <i>Author's note: This could not be verified at the time of writing.</i>	An inventory of people's preferences for interrelating in different environments (work, home, social, etc.) Focuses on communication, understanding and team building. The communication piece explains how the different styles like to learn. The DISC has been widely used and has been through several research studies.
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