California Statewide Training Curriculum Development Guide

This guide provides guidance on the key curriculum components needed to provide standardized training in California. Each curriculum component is defined and examples are provided. This document also includes links to online resources and examples.

November 2019

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INTRODUCTION

The State of California has a vast pool of child welfare trainers and curriculum developers. To ensure statewide consistency and ease of delivery, the California Social Work Education Center (CalSWEC), in conjunction with the California Department of Social Services (CDSS) and the Regional Training Academies (RTAs), has developed the *California Statewide Training Curriculum Development Guide (Guide)*. This Guide will provide recommendations for the curriculum development process, along with supplemental components outlined.

Through standardized, statewide curricula, trainers who train multiple topics will develop a familiarity with the resources. Trainees will benefit from consistent Trainee Guides and the ability to easily locate resources. A standardized, statewide curriculum developed, resourced, and evaluated in a consistent manner will improve reporting to the federal government. The intended use of this Guide is to serve as a resource to Curriculum Development Teams, Curriculum Developers, and those who will bid for a curriculum development project with the State or Children and Family Services Division (CFSD) staff who have training needs. Within the Guide, curriculum development processes are outlined. Within the Appendix section, resources are provided to guide curriculum development with attention to Adult Learning noted within the CDSS Adult Learning Theory Tips and to guide facilitation of Curriculum Development Teams through use of the Super 8 and the Facilitator's Checklist for True Consensus Building. To understand the process around subcommittee activities to develop curriculum and the decision-making authority, the Child Welfare Statewide Training System chart is also provided.

CHILDREN AND FAMILY SERVICES DIVISION (CFSD) TRAINING AND WORKFORCE DEVELOPMENT AND DELIVERY CONSULTATION FRAMEWORK

Policy: Child and Family Services Division (CFSD) staff from the program area requesting training will consult with the Workforce Development and Training (WDT) Subcommittee of the County Welfare Directors Association of California (CWDA) Children's Operations Committee to collaboratively develop training and workforce development and delivery plans.

Purpose: The WDT Subcommittee serves as the guiding subcommittee for CWDA to discuss, analyze, forecast, and plan workforce development. This includes the identification of training needs to support initial and ongoing staff training, and implementation of new mandates and initiatives. In collaboration with CDSS, the WDT Subcommittee will:

▪	Discuss the impact of current and pending policy on workforce development and training within counties.
▪	Work with CDSS to budget and develop training plans to support counties in the implementation of statewide initiatives and ongoing operations.
▪	Strategize and plan methods to improve the child welfare workforce, including pre-service education requirements, employee retention, and in-service training.
▪	Represent CWDA in workforce development and training-related workgroups that are prioritized by the Children's Operations Committee (i.e., ICPM, CWS-CARES).
▪	Serve as a focus group for proposed regulation changes or additions and provide expert-level considerations and feedback to representatives of CDSS.
▪	Review and approve recommendations for initial staff and supervisor training to meet regulation requirements (MPP 14-600 et al.).
▪	Strategize and plan for relevant ongoing staff trainings to meet regulation and PIP requirements.
▪	Act as subject matter experts to representatives of CDSS and assist in the understanding of operational-level workforce development and training.
▪	Strategize and plan for implementation to support fidelity in delivery of training as well as application in the field .

When it is determined that a statewide, standardized curriculum needs to be developed, CFSD staff will consult with the WDT Subcommittee through the following steps:

▪	CFSD staff will contact the Training Support Unit (cwstrainingquestions@dss.ca.gov) to be added to the WDT Subcommittee Agenda.
	When CFSD staff are prepared to discuss training needs with the WDT Subcommittee, the following information should be provided: A. **Brief introduction and background of the training topic** B. **Requirements for and objectives of the training** ▫ Is this a mandated training? Is this a result of legislation/litigation? ▫ Who is the target audience? ○ CWS ○ Probation ○ Mental Health C. **Mandated for all or made available to all** ▫ What is the intent of the training? ▫ Is this an evolving practice that would require frequent and ongoing revision? D. **Funding availability and limitations** ▫ Is this a funded mandate? What is the funding source? ▫ What are restrictions to the funding source? ▫ Are there reporting requirements? E. **Timeline for deliverables** ▫ When does the training need to be available? ▫ Are the deadlines flexible? Is the scope of the project flexible? ▫ How often does the training need to occur? F. **Available expertise and resources** ▫ Is there an identified Subject Matter Expert? ▫ Are there workforce development tools and strategies that reinforce training and practice? ▫ Does curriculum already exist?

	G. **Have stakeholder groups been identified to be included in the vetting of the curriculum?** H. **Which Entity is available to deliver the training?** ▫ In-house trainers or contracted trainers that need to be identified and developed? ▫ Will the training be delivered regionally, or should it be centralized? ▫ What is the best Style of delivery, i.e., classroom, coaching, learning collaborative, conference? ▫ What is the best Modality for delivery, i.e., in-person, toolkit, video, eLearning? I. **Evaluation Plan** ▫ Will curriculum be evaluated at the Knowledge level and/or Skill level? ▫ How will evaluation data be collected and reported? ▫ Who will be responsible for collecting, storing, and managing data? ▫ How will data be utilized? Use of the Statewide Satisfaction survey is required for all trainings. Please use the Sample Statewide Satisfaction survey located within the Appendix section of this report.
	Create an action plan based on the WDT discussion and share with the Training Support Unit. Please see the Appendix section for a sample action plan. ▫ If the plan involves the use of the Statewide Training System to implement, the Training Support Unit will assist in creating contract language to facilitate the amendments as needed. ▫ If the plan involves entities outside the Statewide Training System, a contract with the vendor will need to be implemented.

CRITERIA TO CONSIDER FOR CURRICULUM AND WORKFORCE DEVELOPMENT

Funding Source

- Every funding source has requirements regarding the intended audience and the training topic. A vendor with an existing contract may be used if the contract includes the same funding source that will be used to develop the curriculum. Adding funding to an existing contract, or creating a new contract, will add at least six months to the curriculum development timeline.

Funding Amount

- Ensure sufficient funding for all deliverables necessary for the creation, vetting, piloting, and revision of curriculum. Because curriculum demands are often underfunded, look for vendors that have funding available from another project to offset the costs.

Timeline for Deliverables

- Curriculum needs may come with short timelines for creation and implementation. Determine which vendor is best able to accommodate short-term deadline demands. This may be done through consideration of the vendor's history performing similar deliverables or related experience in the topic area.

Expertise

- Development of high-quality curriculum requires exceptional proficiency in the training topic itself and calls for expertise in the principles of adult learning theory, curriculum writing, implementation, and knowledge of the child welfare system as a whole. It is essential to select a vendor who not only has subject matter expertise, but who has access to other Subject Matter Experts (SMEs) in the field and demonstrates an ability to situate specific course material within the broader context of the child welfare system.

Workload

- Because curriculum needs come with short timelines and brief turnaround times, it is necessary to evaluate the vendor's workload to determine whether they have the capacity to increase their deliverables in a short period of time, should the need arise. Delays and/or failure to meet contracted deadlines may result in penalties to the vendor.

Capacity

- It is important to determine the most cost-effective and timely approach to developing curriculum with consideration for quality. A method to identify, review, and leverage any existing resources shall be developed. Consider currently resourced SMEs – on staff or under contract – who can meet deliverable needs.

FOUR PHASES OF THE CURRICULUM DEVELOPMENT PROCESS

There are four key phases in the development of a statewide, standardized training curriculum: Planning, Developing, Implementing, and Evaluating.

During the **Planning Phase**, a problem statement is crafted and a needs assessment is performed. A needs assessment might include one or more stakeholder brainstorming sessions, a survey of stakeholders to gather their vision and goals for the curriculum, and/or a focus group. These facilitated discussions under the needs assessment occur to determine the desired outcomes for the curriculum and reporting needs, which will guide the Request for Proposal (RFP) process and the Scope of Work (SOW), vendor selection/management, curriculum design and the evaluation instrument, and whether the curriculum has met stakeholder requirements. The problem statement describes the problem to be addressed and notes relevant research literature to guide development of the learning objectives and outcomes, the curriculum map, and what the evaluation instrument will seek to measure.

Phase: One [Planning]	**Assignee**
Perform a needs assessment, i.e., stakeholder brainstorm, survey, or focus group, to establish a clear philosophy and goals that will guide the design of the curriculum and the evaluation instrument. **Prospective questions:** ● What is driving the need for the curriculum (legislation, litigation, county request, or compliance support)? ● What data are available to clarify the need (i.e., input from youth and families, SafeMeasures or SDM, federal case reviews)? ● What are the reporting needs of this curriculum and for what audience How and how frequently should this report be disseminated? ● Are there curriculum design and evaluation reporting needs? ● Are there subject matter expert and vendor selection needs?	Workforce Development Team (WDT) Subcommittee
Convene a Curriculum Development Team of Subject Matter Experts (SMEs) selected through consultation with the Training Support Unit, CalSWEC, and the training system. **This team will be charged with the following activities:**	CDSS
Draft a Scope of Work to inform curriculum and evaluation, to be informed by the need assessment, and to manage the project. **Prospective questions:**	Curriculum Development Team

• Will this curricula address an emerging content area that requires research (i.e., a literature review or outreach to or interview of SME)? • Are there existing curriculum or tools that can be used or updated?	
Define the Outcomes for the Training Program or Course.	Curriculum Development Team
Develop learning objectives for the training course or training program.	Curriculum Development Team
Design a curriculum map that aligns with workforce development and training needs to inform the sequencing of each training course and to inform evaluation design.	Curriculum Development Team
Design a Request for Proposal (RFP) based on the SOW.	Curriculum Development Team
Disseminate the RFP for vendor solicitation through stakeholders and through making available to the public.	Curriculum Development Team
Coordinate an RFP review panel of SMEs and Stakeholders.	Curriculum Development Team
Design an evaluation tool to inform the review panel's process and selection of a vendor. The evaluation tool should use a defensible methodology, i.e., expertise, best value, lowest cost, etc.	Curriculum Development Team
Oversee an RFP review process and vendor selection.	Curriculum Development Team
Select a vendor and execute a vendor contract, inclusive of the Scope of Work and a project completion estimate in consultation with the CDSS Contracts Unit.	CDSS
Develop a Project Schedule to oversee the execution and management of the vendor and the curriculum and evaluation development.	Curriculum Development Team

During the **Developing Phase**, the Curriculum is developed through the oversight of a Curriculum Development Team of SMEs and in conjunction with a vendor. A Project Schedule (designed under the Planning Phase) is executed to guide the curriculum development through a vetting, pilot, and final revision process (specific details outlined in the chart below). Within the development phase, a Toolkit of Resources, Training-for-Trainers, eLearning modules, and an Implementation Checklist may be developed. The evaluation measure is developed during this phase of the project to support implementation in alignment with the roll out of training curriculum.

Phase: Two [Developing]	Assignee
Develop the curriculum (PowerPoint, Trainee Guide, Trainer Guide, Resources, Copyright notices, Bibliography, etc.). Review and/or design the evaluation instrument designed to measure learning, transfer, and/or training outcomes.	Curriculum Development Team/Evaluation Team /Vendor
Develop eLearning Modules, i.e., prerequisite, refresher, or stand-alone, as needed.	Technology Team/Vendor
Vet the curriculum through circulation of the draft curriculum statewide to various SMEs and other stakeholders to gather feedback.	Curriculum Development Team
Revise the curriculum post-vetting and pre-pilot. Integrate feedback received from vetting(s).	Curriculum Development Team/Vendor
Determine the pilot participants, i.e., Social Workers, SMEs, stakeholders, trainers, etc.	Curriculum Development Team
Determine the observers of the pilot, i.e., Social Workers, SMEs, stakeholders, trainers, etc., and provide a flyer for travel approval, a registration link for onsite logistics, and a Qualtrics formative evaluation survey to capture Observer feedback.	CalSWEC
Determine who will train and gather feedback during the pilot process. Determine who will facilitate the logistics of the pilot, i.e., where and when.	Curriculum Development Team/Vendor
Pilot the curriculum.	Curriculum Development Team/Vendor
Revise the curriculum post-pilot and pre-implementation. Integrate feedback received from the pilot(s) into the final format.	Curriculum Development Team/Vendor
Finalize the curriculum and make available for training.	Curriculum Development Team
Develop "Train-the-Trainer" Materials.	Curriculum Development Team/Vendor
Build a Toolkit of Resources for Trainees to access post-training.	Curriculum Development Team/Vendor
Develop or Identify materials to guide implementation, i.e., an implementation checklist or risk register, and to measure fidelity.	Curriculum Development Team

During the **Implementation Phase**, the key material is the implementation checklist (developed during the developing phase). This tool will serve as the base of any implementation process assessment and measurement of fidelity.

Phase: Three [Implementing]	**Assignee**
Determine who will need to be trained on this curriculum. Determine who will train the curriculum. Coordinate with training entities.	Curriculum Development Team
Develop plan for technical assistance to support use of practices covered by the curriculum, to fidelity.	Curriculum Development Team /Training Entity
Develop the following: ▪ an implementation timeline, inclusive of a plan for roll-out ▪ a plan for a statewide or cohort implementation model ▪ implementation fidelity considerations ▪ an evaluation instrument to inform assessment of the curriculum to meet any ongoing data and reporting needs.	Curriculum Development Team
Roll out the New Training Program or Course. Download materials from the CalSWEC website.	Curriculum Development Team /Training Entity
Secure Training Facility.	Training Entity
Create List of and Print Session Materials.	Training Entity
Contract Trainers.	Training Entity
Prepare Trainers ("Train-the-Trainer" Sessions). Contract Trainers.	Training Entity
Create Training Schedule.	Training Entity
Create and Distribute Flyer.	Training Entity
Register Participants.	Training Entity
Create Rosters, Tent Cards, etc.	Training Entity
Hold Training Sessions.	Training Entity
Determine if the evaluation will be distributed as hard copy or electronically.	Training Entity
Determine plan for fidelity evaluation, both of training delivery and of use of the content in the field.	Training Entity

During the **Evaluating Phase**, data collection and reporting are the premier considerations, as through the evaluation instrument the success of the training will be measured and findings will be used to inform ongoing revision.

Phase: Four [Evaluating]	**Assignee**
Evaluate Training at the level of Satisfaction, Learning, and/or Transfer at intervals.	Evaluation Team
Consider the technological capabilities required for completion of the evaluation activity within the training classroom.	Training Entity
Update the Training Program or Course informed by the evaluation findings.	Curriculum Development Team
Evaluate the success of the Training Program or Course.	Evaluation Team, WDT Subcommittee, and CDSS
Conduct a lessons learned follow-up review of overall process: ▪ What worked well? ▪ What was effective? ▪ What challenges arose? ▪ What were lessons learned? Suggestions for improvement.	Curriculum Development Team

CURRICULUM DEVELOPMENT IMPLEMENTATION CHECKLIST

**This tool was adapted from the California Core Practice Model (CPM) Implementation Plan Template.*

Step #1 – What Is Our Problem Statement? What Are the Findings of Our Needs Assessment? Who Is on Our Curriculum Development Team?

Use your Problem Statement and the findings of your Needs Assessment to select your Curriculum Development Team. List the members of your Curriculum Development Team below:

How is the team identified? Who should be included? Why?

Step #-2 – Define Success: What Changes Do We Want to See as a Result of Training?

Articulating what success looks like helps you to strategically target the Curriculum Development Team's efforts toward specific learning objectives and to guide the Evaluation Team's crafting of an evaluation measure that will gather relevant data for the generation of useful reports on learning outcomes.

Engage Your Curriculum Development Team in Defining Success

In collaboration with your team, consider all the priorities identified in Step 2a and ask yourselves, "What changes are we hoping to see by the end of the planning horizon and by the end of training if these priorities are addressed?"

Step #3a – Set the Plan Boundaries: Where Do We Start? Where Do We Want to Go (What outcomes are we trying to accomplish?)? What Do We Need to Measure to Know that Training Was a Success?

With your Curriculum Development Team, assess the needs of the curriculum and the priorities that are to be achieved. Use the table below to define the priorities on which to focus your curriculum development, ongoing data collection and reporting needs, and to guide the work of your Curriculum Development Team:

Priorities for Curriculum Development

Scope of Work	☒ **Glossary -** *Spell out acronyms and include definitions.* ☒ **Needs Assessment/Problem Statement -** *Describe the problem that this training would address and note any relevant research.*

	☒ **Objectives of the Project/Deliverables** - *Note goals that will result from the delivery of the training curriculum.* ☒ **Project Schedule** - *Note how the group will work, how frequently, and for how long, i.e., calls, conferences, meetings, and important dates for the project, i.e., milestones, tasks, and deliverables, etc.*
Learning Objectives	☒ *What knowledge should trainees have, what skills should they be able to perform independently and/or while back on the job, or what attitudes should they acquire upon successful completion of the training course?*
Curriculum Mapping	☒ *In what course or segment will trainees be introduced to or master the necessary and defined learning objective (i.e., knowledge, skills, or attitudes)?*
Using Data for Understanding & Continuous Quality Improvement	☒ *How will trainees demonstrate that they have achieved the learning objectives of training, i.e., to what degree is demonstration of achievement of a specific learning objective necessary?*

Step #3b – Set the Plan Boundaries: What's Our Planning Horizon?

Through a project plan identify the span of time your workgroup will need for carrying out the curriculum development and implementation processes. The planning horizon begins with the target start date for action on any of the Plan priorities and ends when sufficient progress has been made to reassess circumstances and revise the Plan. A typical planning horizon is 12 to 18 months. Think about your fiscal cycle and other considerations in choosing an appropriate planning period. Enter the target dates below:

Curriculum Implementation Planning Horizon	
Target Start Date	**Target Date for Reassessment(s)**

KEY COMPONENTS OF CURRICULUM MATERIALS

Every curriculum should consist of a Trainer Guide and a Trainee Guide. Providing trainers across the state with these standard materials will help to facilitate their preparation process. Further, this practice allows for consistent statewide messaging and should reduce inconsistencies in training delivery.

The Trainer Guide should include, but is not limited to: (a) Table of Contents, (b) Introduction, (c) Acknowledgements/Copyright information, (d) Agenda, (e) Learning Objectives, (f) Lesson Plan including PowerPoint, (g) Materials Checklist, (h) Supplemental Handouts, and (i) References and Bibliography

The Trainee Guide should include, but is not limited to: (a) Table of Contents, (b) Introduction, (c) Acknowledgements, (d) Agenda, (e) Learning Objectives, (f) Training Content including PowerPoint, (g) Supplemental Handouts, (h) References and Bibliography, and (i) Other Resources (as needed).

TRAINER GUIDE

The Trainer Guide defines the content to be covered by the trainer (see Appendix A) and details the standardized information to be conveyed to trainees. To ensure uniform messaging across the state and fidelity to the curriculum, the Trainer Guide must be written in a clear, easy-to-follow manner.

The components of the Trainer Guide are described below.

Table of Contents
A Table of Contents should identify how to locate resources within the Trainer Guide.

Acknowledgements
An Acknowledgements page should be included to thank the stakeholders and contributors to the curriculum and should include the language below:

> This curriculum is developed with public funds and is intended for public use. For information on use and citation of the curriculum, please refer to: https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf

Introduction
The statewide curriculum is intended to be generalized and applicable across the state. It conveys universal knowledge and essential skills for the topic area to the target audience. This section provides both the framework for the curriculum and functions as an orientation for the trainer on how to use the guide for the proper delivery of the material. For example:

> For an overview of the training, it is recommended that trainers first review the Agenda and Lesson Plan. Next, trainers should review the activities for each training segment in the Trainer Guide as well as the training content and course materials provided in the Trainee Guide. This will help familiarize the trainer with each topic, training activity, and intended flow of the course. It is helpful if trainers print both the Trainer and Trainee Guides for themselves so that they can easily refer the trainees to activities during class.

Agenda
The Agenda is a simple, sequential outline indicating the timing of the segments in the training day and which Learning Objectives are being covered. This consists of the start and end times, length, and an overview of each activity, including lunch and breaks. The Agenda in the Trainer Guide should mirror that of the Trainee Guide to serve as a mutual agreement to remain on schedule.

The Agenda is divided into major sections by Day 1, Day 2, and Day 3 of the training, as applicable. It contains two column headings: (1) Segment and (2) Methodology and Learning Objectives. The Segment column provides the topic and training time for each segment of the training. The Methodology and Learning Objectives column reflects the specific activities and objectives that are covered in each segment.

Learning Objectives

The Learning Objectives serve as the basis for the training content. All Learning Objectives for the curriculum are listed in both the Trainer and Trainee Guides. The Learning Objectives are subdivided into three categories: Knowledge, Skills, and Values. Each objective should be a clear, concise, and measurable statement identifying what Knowledge, Skill, or Value participants will gain from the training. Learning Objectives are numbered in a series beginning with K1 for Knowledge, S1 for Skills, and V1 for Values and should be sequenced to facilitate the scaffolding of content within the curriculum. The Learning Objectives are also indicated in the Lesson Plan for each segment of the curriculum.

Knowledge objectives focus on declarative learning – the concrete information trainees should know and be able to identify, explain, or define. Knowledge objectives are best used for key information the trainer wants to convey (e.g., laws, policies, theoretical concepts, and definitions). If the training introduces a law or policy and provides a desk guide for future review and study, the Learning Objective should state the participant will identify the concept rather than define or explain it. Here is a sample knowledge objective:

> K1 - The participant will be able to explain the terms "non-dependent minor" and "supervised independent living placement."

Skill objectives focus on applied learning – the real-world skills for which participants should demonstrate proficiency (e.g., completing a form or interacting with a family member). Typically, this is accomplished by incorporating a scenario, case example, or role-play activity to accomplish the goal. Skill objectives should build on the declarative knowledge identified in the knowledge objectives. It is important to allow time in the training to convey the basic knowledge related to the skill, show how to perform the skill (by demonstrating it or showing a video), and then allow the participants to practice the skill while providing feedback.

Because Skill objectives take time to teach effectively, be judicious in how many are included in a training. Here is a sample Skill objective:

> S1 - Given a case example or scenario, the participant will be able to demonstrate an initial conversation with a non-dependent minor that includes information about: non-minor dependent status, AB12 eligibility requirements, and supervised independent living placement.

Value objectives identify the underlying value changes participants must make in order to apply their newly acquired knowledge and skills successfully. This section should outline the paradigm shifts and new perspectives that will help participants carry forward the skills and knowledge they have gained. Engage participants in thinking about values by allowing time to consider and discuss case examples or difficult situations. Here is a sample Value objective:

> V1 - The participant will value the role of non-dependent minors in making decisions and developing supervised independent living placements.

Lesson Plan

The Lesson Plan is the main component of the Trainer Guide and is comprised of segments that provide step-by-step instructions on how to deliver the training content. It includes detailed descriptions of how to set up and carry out the activities, as well as tips for preparing, presenting, and processing the activities.

Training Segments

Each segment should specify the corresponding PowerPoint slide(s) (if applicable), any required materials, and the amount of time to be designated to each activity. Including PowerPoint slides with curriculum materials allows trainers to use standardized visuals to convey key points. Importantly, rather than serving as a script (unless fully standardized), slides are intended to outline talking points and discussion questions for the trainer that can help them reinforce the information in the Trainee Guide. Whenever possible, trainers should be encouraged to facilitate focused, meaningful group discussion in order to deliver content.

It is best to keep the slides simple and concise. Slides should have no more than three key points. Too much content on one slide may be a distraction if participants begin reading slides rather than listening to the trainer.

One training segment might focus on identifying the broad components of law (such as AB12) and may include several activities used to communicate key information about the law, demonstrate a skill related to implementation and application of the new legislation, and allow trainees to consider values relevant to its use. The first activity may ask trainees to read a fact sheet about the law individually, the second may pair trainees for a scripted role-play, and the third could bring the group together for a discussion about related values.

Each training should use a variety of modalities to help trainees thoroughly understand each segment's topic of focus and intentionally facilitate development of knowledge, skills

or values. The Lesson Plan maps the segments and activities to be completed throughout the training and identifies the following:

- order of segments
- time needed for each segment
- order of activities within segments
- training modality and timing for each activity
- materials needed
- Learning Objectives to be conveyed by each segment
- the corresponding PowerPoint slide(s) for each activity

Materials Checklist

To facilitate the training preparation process, the Materials Checklist provides a complete listing of materials needed for the training. Materials specific to individual training activities are also noted in the Lesson Plan.

Supplemental Handouts

Supplemental Handouts refer to links for additional handouts not included in the Trainer Guide. Supplemental Handouts may include worksheets or reference guides for training activities for later use.

References and Bibliography

The References and Bibliography indicate the sources that were reviewed by the curriculum designer(s) to prepare and write any main, supplemental, and content information, training tips, training activities, or other information included in the training materials. It may include additional resources that apply to a particular content area. The References and Bibliography may include the following:

- All-County Letters (ACLs) and All-County Information Notices (ACINs) issued by the California Department of Social Services (CDSS)
- Legal References (as applicable)
- General References and Bibliography

TRAINEE GUIDE

The Trainee Guide may consist of handouts, desk guides, resource guides, information sheets, and activity worksheets provided to the participants during the training. For ease of reference, format the guide with titles, page numbers, and a Table of Contents. This allows the trainer to direct the participants to the content for each activity. Participant materials should include reference information so that others (trainers or participants) can access original source material or identify when materials may be outdated.

These materials are vital for the successful transfer of information. The better organized they are, the more the participants will be able to understand and use them on the job.

Table of Contents

A Table of Contents should clearly identify how to locate resources within the Trainee Guide.

Introduction and Acknowledgements

The Introduction and Acknowledgement section should provide context for the curriculum. This section will detail the history of the training topic to provide background, give specific instructions on the use of the guide, and acknowledge the stakeholders and curriculum writers who created the curriculum. This section must also include the following statement:

> This curriculum is developed with public funds and is intended for public use. For information on use and citation of the curriculum, please refer to: https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf

Agenda

The Agenda is a sequential outline indicating the order of events in the training day. This includes the coverage of broad topic areas, training activities, lunch, and break times. The Agenda in the Trainee Guide should mirror that of the Trainer Guide to serve as an agreement to remain on schedule.

Learning Objectives

The Learning Objectives serve as the basis for the training content that is provided to the trainees. The Learning Objectives for the curriculum are listed in both the Trainer and Trainee Guides. The Learning Objectives are subdivided into three categories: Knowledge, Skills, and Values. Each objective should be a clear, concise, measurable statement identifying what Knowledge, Skill, or Value participants will gain from the training.

Training Content
The training content is the main component of the Trainee Guide. It contains the handouts, worksheets, and vignettes for all training activities. Each item should have a clear title and page number that can be referenced in the Table of Contents.

The PowerPoint slide deck, printed three (3) slides to a page, must be included in the Trainee Guide. This allows participants to follow along easily and organize their notes during the training and can serve as a useful reference back at the office. Please consider conserving paper when possible. Print only what is necessary.

Supplemental Handouts
Supplemental Handouts may or may not be included in the Trainee Guide because their size or format requires that they be printed separately. They may include worksheets or reference guides for training activities (or for later use). They may also be made available online via a toolkit

References and Bibliography
The References and Bibliography indicate the sources that were reviewed by the curriculum designer(s) to prepare and write any main, supplemental, and background content information, training tips, training activities, or other information included in the training materials. It may include additional resources that apply to a particular content area. The References and Bibliography may include the following:

- All-County Letters (ACLs), County Fiscal Letters (CFLs), and All-County Information Notices (ACINs) issued by the California Department of Social Services (CDSS
- Legal References (as applicable)
- Federal References (as applicable)
- General References and Bibliography

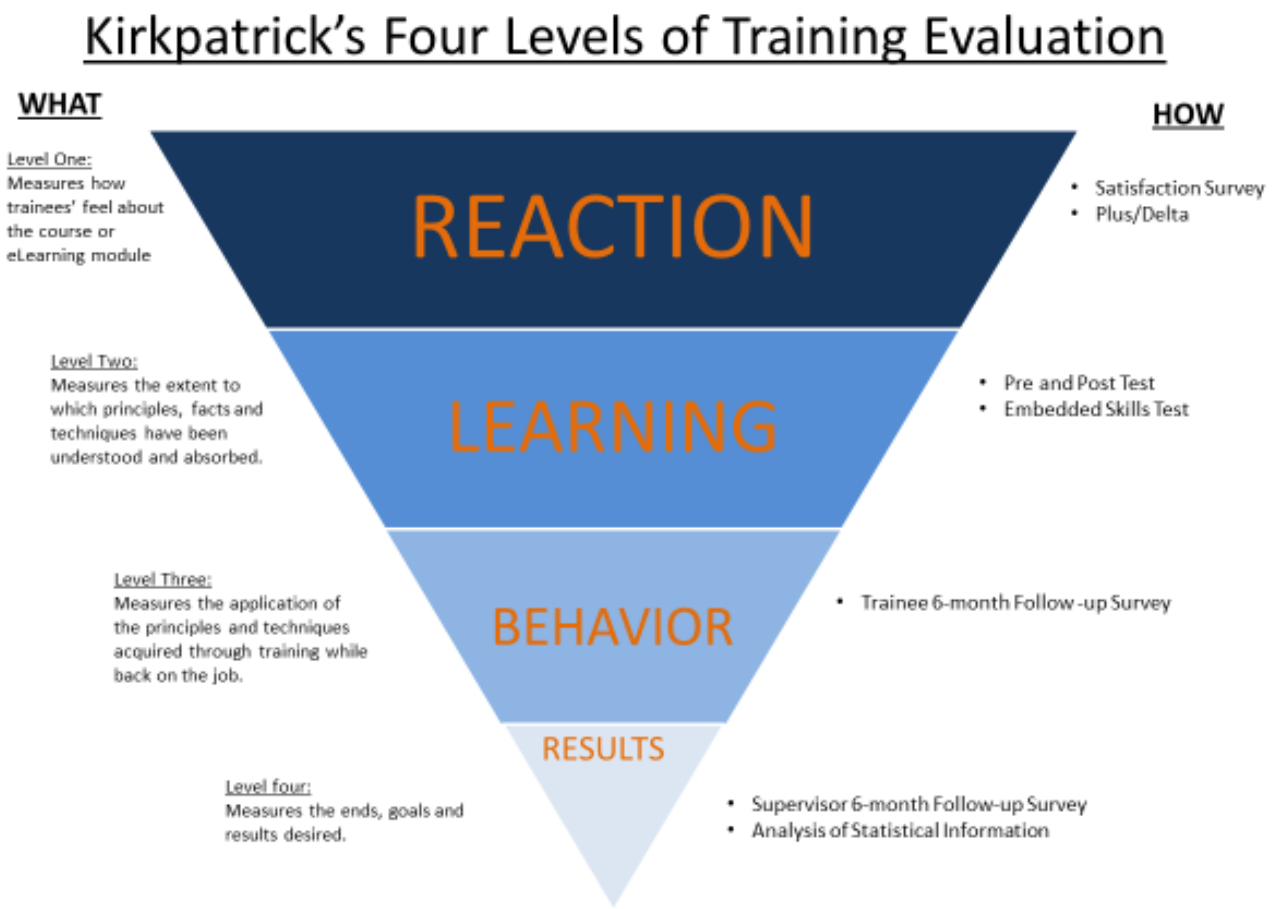
EVALUATION

A necessary component of developing and improving a curriculum includes evaluating its efficacy. A strong evaluation design will consider the impact of both the content and the delivery of the material. A strong analysis plan will allow for the unique contribution of each to be modeled statistically.

In keeping consistent with the factors considered in the Learning Objectives, an evaluation plan should include measures of declarative knowledge acquisition, skills acquisition, and the ability to measure whether learning transfer has occurred. It should also explore whether the training program contributes to improved outcomes for the organization. It is also useful to consider how the target audience is receiving the curriculum; the inclusion of a "satisfaction survey," for example, can accomplish this.

The graphic on the next page illustrates one model commonly used to evaluate training results and includes criteria to measure each of the above. The Kirkpatrick Model's four levels guide the evaluation process to ensure that Reaction, Learning, Behavior, and Results are all considered when assessing a training program. See the Appendix for a sample of a Satisfaction Survey.

KIRKPATRICK MODEL OF TRAINING EVALUATION



APPENDIX

ADA COMPLIANCE

The California Social Work Education Center (CalSWEC), website meets the accessibility standards of UC Berkeley based on the Americans with Disabilities Act of 1990 (ADA), Section 508. The CalSWEC website is on the Open Berkeley platform, which by design makes the website (content, format, features) accessible to people with disabilities, including those who use assistive technology.

For further resources regarding ADA Compliance please visit the following link: ADA Compliance Checklist

See the US Department of Health & Human Services checklist on the following pages for further reference.

PDF File 508 Checklist (WCAG 2.0 Refresh)

The checklist from Section A forward is based on the WCAG 2.0 requirements.

Compliance Checklist

In addition to Section 508 requirements, HHS has policies, standards, and requirements for electronic documents that include but are not limited to the following:

ID	Requirements	Result
AA1	Document file name should not contain any spaces or special characters.	
AA2	Document file name needs to be concise, generally limited to 20-30 characters and should clarify the contents of the file.	
AA3	All Document properties should be filled out: Title, Author, (an HHS OpDiv, StaffDiv, or Program Office---not an individual's names) Subject, and Keywords	
AA4	Use electronic version for any signatures.	

The checklist below, a series of tables, is based on the content of the PDF. Acceptable answers are: Yes, No, or N/A. If 'No' is the answer to any item, then the document is not 508 compliant.

Section A: All PDFs

These checks should be performed on all PDFs no matter of what is present in the actual content:

ID	Requirements	Traceability to 508	Result
A1	Is the PDF tagged?	WCAG 2.0 Success Criterion 1.3.1	

A2	Is the Document Title filled out in the Document Properties?	WCAG 2.0 Success criterion 2.4.2	
A3	Is the correct language of the document set?	WCAG 2.0 Success criterion 3.1.1	
A4	Did the PDF fully pass the Adobe Accessibility Checker?	WCAG 2.0 Success Criterion 4.1.1	
A5	Is the document free from content that flashes more than 3 times per second?	WCAG 2.0 Success Criterion 2.3.1.	
A6	Are accurate bookmarks provided for documents greater than 9 pages?	WCAG 2.0 Success Criterion 2.4.5.	
A7	Is the document free from review-related content carried over from Office or other editing tools such as comments, track changes, embedded Speaker Notes?	WCAG 2.0 Success Criterion 1.3.1	
A8	Is the order in the tag structure accurate and logical? Do the tags match the order they should be read in?	WCAG 2.0 Success Criterion 1.3.2.	
A9	Is all informational content contained in the tag structure?	WCAG 2.0 Success Criterion 1.3.1	

A10	Are all non-standard tags appropriately mapped to standard Adobe tags?	WCAG 2.0 Success Criterion 4.1.2	
A11	Is all the text within the tags correctly formatted? (Free from line breaks and split words) Learn more about finding and fixing backend text errors.	WCAG 2.0 Success Criterion 4.1.1	
A12	Do paragraph tags accurately represent visual paragraphs?	WCAG 2.0 Success Criterion 1.3.1	
A13	Can text be resized and considered readable when magnified to 200%?	WCAG 2.0 Success Criterion 1.4.4.	

Section B: PDFs containing Color

ID	Requirements	Traceability to 508	Result
B1	Is information conveyed by methods other than color alone?	WCAG 2.0 Success Criterion 1.4.1.	
B2	Does all text (with the exception of logos) have a contrast ratio of 4.5:1 or greater no matter the size?	WCAG 2.0 Success Criterion 1.4.3. (Size stipulation not considered by HHS)	

Section C: PDFs containing Links

ID	Requirements	Traceability to 508	Result
C1	Are links tagged correctly in the tag structure? (Contain visual link text and link OBJR within the Link tag)	WCAG 2.0 Success Criterion 1.3.1.	
C2	Are links distinguished by a method other than color?	WCAG 2.0 Success Criterion 1.4.1,	
C3	Can all link text be understood out of context? If not, does generic link have sufficient context?	WCAG 2.0 Success Criterion 2.4.4,	

Section D: PDFs containing Images

ID	Requirements	Traceability to 508	Result
D1	Are all images conveying information tagged as figures and included in the tag structure?	WCAG 2.0 Success Criterion 1.3.1.	
D2	Do all images conveying information have alt text that provides the same level of understanding a visual user would gain?	WCAG 2.0 Success Criterion 1.1.1.	

D3	Are all decorative images tagged as artifact/background?	WCAG 2.0 Success Criterion 1.1.1.	
D4	Do complex images have an alternate accessible means of understanding?	WCAG 2.0 Success Criterion 1.1.1.	
D5	Is the document free from images of text? (Picture of an informational table, screenshot of text from another source, etc.)	WCAG 2.0 Success Criterion 1.4.5	
D6	Are groups of related images tagged in a way assistive technology users would understand?	WCAG 2.0 Success Criterion 1.1.1.	

Section E: PDFs containing Tables

ID	Requirements	Traceability to 508	Result
E1	Does the document use table tags only for data tables?	WCAG 2.0 Success Criterion 1.3.1.	
E2	Does the table structure in the tag tree match the visual table layout?	WCAG 2.0 Success Criterion 1.3.1.	
E3			

	Are all header cells tagged with the TH tag? Are all data cells tagged with the TD tag?	WCAG 2.0 Success Criterion 1.3.1.	
E4	Do all Header cells contain text?	WCAG 2.0 Success Criterion 1.3.1.	
E5	Are merged cells correctly spanned with Colspan and/or Rowspan?	WCAG 2.0 Success Criterion 1.3.1.	
E6	Do data tables with 1 set of both column and row headers appropriately use scope to associate to data cells?	WCAG 2.0 Success Criterion 1.3.1.	
E7	Do data tables with more than 1 set of column and/or row headers appropriately use id/headers to associate to data cells?	WCAG 2.0 Success Criterion 1.3.1.	

Section F: PDFs containing Lists

ID	Requirements	Traceability to 508	Result
F1	Are all visual lists tagged correctly with the List, List Item (LI), and LBody tags?	WCAG 2.0 Success Criterion 1.3.1.	
F2	Does the number of items in the tag structure match the number of items in the visual list?		

		WCAG 2.0 Success Criterion 1.3.1.	
F3	Are nested lists appropriately nested in the tag structure?	WCAG 2.0 Success Criterion 1.3.1.	

Section G: PDFs containing Headings

ID	Requirements	Traceability to 508	Result
G1	Is text intended to act as a visual heading tagged with the heading tags (H1 through H6)?	WCAG 2.0 Success Criterion 1.3.1.	
G2	Do heading tags follow a logical hierarchical progression? (Do not skip heading levels)	WCAG 2.0 Success Criterion 1.3.1.	
G3	Are heading tags used only on text that defines a section of content?	WCAG 2.0 Success Criterion 1.3.1.	
G4	Does the Heading text accurately describe the sectional content?	WCAG 2.0 Success Criterion 2.4.6	

Section H: PDFs containing Forms

ID	Requirements	Traceability to 508	Result
H1	Are all form fields correctly tagged?	WCAG 2.0 Success Criterion 3.3.2	
H2	Do all form fields contain understandable labels and tooltips?	WCAG 2.0 Success Criterion 3.3.2	
H3	Do tooltips contain all formatting requirements that will be automatically flagged as an error?	WCAG 2.0 Success Criterion 3.3.2	
H4	Are required fields programmatically set?	WCAG 2.0 Success Criterion 3.3.1	
H5	Is the tab order of the form fields logical?	WCAG 2.0 Success Criterion 1.3.2.	

Section i: PDFs containing other common elements

ID	Requirements	Traceability to 508	Result
i1	Is any nonstandard text (glyph) tagged in an accessible manner?	WCAG 2.0 Success Criterion 1.1.1.	

i2	Was OCR successfully performed on a scanned image document?	WCAG 2.0 Success Criterion 1.4.5.	
i3	Was the language appropriately set for all foreign words or phrases?	WCAG 2.0 Success Criterion 3.1.2	
i4	Is the table of contents tagged with appropriate tags? (TOC, TOC Item (TOCI))	WCAG 2.0 Success Criterion 1.3.1.	
i5	Are all internal links/TOC entries functioning correctly (if linked)?	WCAG 2.0 Success Criterion 2.4.5.	
i6	Are citations and footnotes/endnotes tagged with appropriate tags? (Reference, Note)	WCAG 2.0 Success Criterion 1.3.1.	

Content created by Digital Communications Division (DCD)

Content last reviewed on May 6, 2019

TRAINER GUIDE TEMPLATE

[Title of Training]
Trainer Guide

Training Version | Year

TABLE OF CONTENTS

ACKNOWLEDGEMENTS

INTRODUCTION

This California Statewide Curriculum Guide has been 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 on the CalSWEC website. https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf

AGENDA

Segment	Methodology	Learning Objectives

LEARNING OBJECTIVES

Knowledge
K1.
K2.

Skills
S1.
S2

Values
V1.
V2.

LESSON PLAN

Segment 1: Welcome and Introductions to the Training

ACTIVITY 1A: Introductions Icebreaker

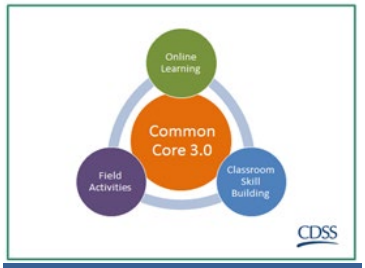
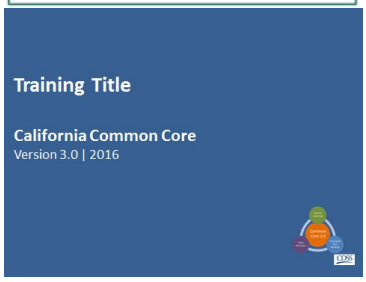
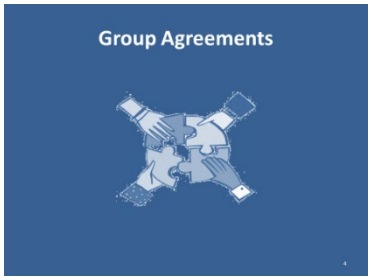
Estimated Segment Time:	9:15-9:45
Trainee Content:	Agenda (page 4 in the Trainee Guide) Learning Objectives (page 6 in the Trainee Guide)
Materials:	Chart pad, markers, and tape (if doing group agreements) Question Cards for icebreaker activity
Slides:	1-3

Description of Activity:
The trainer will conduct an introductory activity including a review of the Agenda and an introductions icebreaker.

Before the activity

☒ Decide whether or not you will establish group agreements as part of this activity. If you plan to develop group agreements, prepare your chart pad in advance with some initial agreements such as starting and ending on time, sharing the floor, etc. Leave space for the group to develop their own group agreements.
☒ Make sure you have enough Question Cards for all the trainees.

During the activity

☒ Welcome the participants to the training and introduce yourself. ☒ If needed, discuss logistics related to the training site (cell phones off, breaks, parking, bathrooms).	 
☒ Provide an overview of the agenda and learning objectives for the day.	
☒ If you are doing group agreements, go over the basic group agreements included on the slide and use chart pad paper to add agreements or modify the one provided. Offer the following brief explanations of the group agreements[1] as needed (this will depend on whether or not this group has already worked to establish group agreements). This activity provides a model for the group work social workers will do with child and family teams, so you may wish to make that connection as well. ○ **Collaboration** - We need partnership to have engagement and that works best if we trust each other and agree we are not here to blame or shame. We are here because we share a common concern for the safety and well-being of children. Remind them how this skill will be needed when working with families as they are the experts on their family. Social workers must be able to foster collaboration in order to complete a thorough assessment of the situation.	

[1] Shared by trainer Betty Hanna

Families need to feel trust before they can honestly examine themselves and dissect a problem and acknowledge their part in it. ○ **Ask lots of questions** – Encourage participants to make the material relevant for themselves by asking lots of questions and evaluating the information with regard their own experiences ○ **Be Open to Trying New Things** - As professionals we feel more comfortable and competent sticking with what we know. Sometimes it feels uncomfortable to try new things so we tend to back away from the new thing, telling ourselves things like "she doesn't know what she's talking about…she has never worked in our community with the people we work with…" But to learn something new we have to go through the uncomfortable stage to get to the other side where it feels natural and comfortable. With this group agreement, they are agreeing to try new things even if they feel uncomfortable. ○ **Make Mistakes** - As professionals we don't like to make mistakes. And when we make mistakes we feel discouraged and beat ourselves up. But, if we are going to learn new things, we have to make mistakes. Even more important than the willingness to make mistakes is the willingness to admit we are wrong even when we don't want to be. Growth requires that we are open to changing our minds based on new information received. We must also be willing to put our own ideas aside to fully hear the views of others. ○ **Confidentiality** - This is just a reminder that information about families or other trainees shared in the training room should be kept confidential. ○ **Be responsible for your own learning** – As adult learners we realize you come with knowledge, skills, and experience. The intention of this curriculum is that you will have an opportunity to share this via large and small group discussions. Please come prepared to training having taken any prerequisite eLearning or classroom trainings. Set aside this day for your learning; please do not bring work into the classroom, this is distracting to other participants as well as to the trainer/facilitator. This includes being on time, sharing the floor, cell phones off…	

Transition to the next segment

☒ Move on to the next segment, a review of the [Title of next segment].

SUPPLEMENTAL HANDOUTS

(Handout 1 Title)

REFERENCES/BIBLIOGRAPHY

TRAINEE GUIDE TEMPLATE

[Title of Training]
Trainee Guide

Training Version | Year

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AGENDA

Segment	Methodology	Learning Objectives

LEARNING OBJECTIVES

Knowledge
K1.
K2.

Skills
S1.
S2

Values
V1.
V2.

TRAINING CONTENT

HANDOUT/WORKSHEET (TITLE)

SUPPLEMENTAL HANDOUTS

REFERENCES/BIBLIOGRAPHY

RESOURCES

SAMPLE REFERENCES AND BIBLIOGRAPHY

All County Letters (ACLs)

06-07: Change in Time Period for Completion of a Case Plan
http://www.dss.cahwnet.gov/lettersnotices/entres/getinfo/acl06/pdf/06-07.pdf

All County Information Notices (ACINs)

I-05-05: Family Connections
http://www.dss.cahwnet.gov/lettersnotices/entres/getinfo/acin05/pdf/I-05_05.pdf

I-23-04: Implementation of Concurrent Planning - Promising Practices
http://www.dss.cahwnet.gov/lettersnotices/entres/getinfo/acin04/pdf/I-23_04.pdf

General Resources and Bibliography

Altman, J. (2008). Engaging families in child welfare services: Worker vs. client perspectives. *Child Welfare, 87*(3), 41-61.

Berrick, J.D. (2009). *Take me home: Protecting America's vulnerable children and families.* New York: Oxford University Press.

California Department of Social Services. (2005). Manual of Policies and Procedures: Child Welfare Services, Manual Letter No. CWS-05-01, Division 31-206 Sacramento, CA: CD.

SAMPLE SATISFACTION SURVEY

	Strongly Disagree (1)	Disagree (2)	Agree (3)	Strongly Agree (4)	Not Applicable (5)
What I learned in training was reflective of the Learning Objectives outlined for the course. (Q1)					
In-class discussions enhanced my learning experience. (Q2)					
The opportunities provided to practice in class enhanced my learning experience. (Q3)					
My knowledge of the topic area has significantly increased as a result of this training. (Q4)					
I expect to be able to apply the knowledge and skills that I learned in this training on the job. (Q5)					
I am better prepared to address issues of bias in my practice and to provide fair and equitable treatment to children and families as a result of this training. (Q6)					
The material was delivered in a way that helped me understand course concepts. (Q7)					

Q8 Please share any suggestions that you have for how this training could be improved.

_____

_____

_____

CDSS ADULT LEARNING TIPS

Workforce Development Bureau

Adult learners prefer the following because they bring great professional and life experiences, wisdom, successes, honors, and education to the classroom. Therefore, their needs are different than children and college students.

1. Adults should contribute to the learning objectives, so ask them if they want to add anything to the list in the beginning of the class.
2. Share their own experiences. They should be encouraged to share what they have lived and seen, and not be shamed for their problems or "wins" or discounted.
3. You are dealing with strong egos and adults don't want to look bad in front of their bosses and peers. Be mindful of the relationships between participants and level the playing field with extreme respect.
4. They need to be respected for their achievements, which are many times greater than those of the facilitator. The instructor must show respect for all their audience has been through and struggled for. Many participants may not have the higher education but they have achieved major victories in parenthood, personal issues, community leadership, professional successes, etc.
5. They have different learning styles, and some have identified them and proactively use their style to learn. The facilitator must design the class for all the learning styles and allow people to work according to their own methods.
6. Adults are accustomed to problem solving, so the instructor must lecture no more than 15 minutes and then give an activity.
7. Adults are used to making their own decisions and making choices. Therefore, the instructor cannot dictate to grown people, but give options.
8. Instructor should set ground rules early and ensure all the adults respect the opinions and experiences of the others since we can all learn from others' journeys.
9. Adults don't need punishments, just reflection, discussion, and thoughtfulness. Instructors cannot punish for wrong answers like they might for a class of children.
10. Adults need to know absolutely how this training is relevant to them, their families, their jobs, or they will lose interest immediately. It is very hard to retrieve people's attention once they decide the training is a waste of time.
11. Adults are eager to grow and learn if it is fun, beneficial to them personally, and in small chunks of information NOT delivered in an 8-hour lecture. No lectures.
12. Laughter, levity, and longer lunches. Adults have so many worries and responsibilities, so bring lots of fun and laughter to keep their spirits high and engage their attention away from their phones. Give them permission to laugh and have joy.

Basic/Sample Engaging Format:

1. Welcome
2. Introductions
3. Fun Icebreaker or simple warm-up: What are you hoping to gain from this class? Or, How many people are "voluntold" to be here? They get a special prize! Or …. What can we do to make this a great day?
4. Agenda/housekeeping/ground rules/parking lot for ideas that are not relevant to the topic at hand
5. Video or…..?
6. Issue #1
    a. Activity
    b. Debrief

Break (ask: how long should we break for? 10 min? 15?)

7. Return from Break: quiz or game with prizes for returning on time. Those who are late do not get chocolate.
8. Issue #2
    a. Activity
    b. Debrief
9. Video or…..?
10. Q and A with prizes and clapping

Break

11. Pulse Check (How are we doing? Are we hitting all of our objectives? How are we feeling? Are we ok with leaving 30 minutes early?)
12. Issue #3
    a. Activity
    b. Debrief
13. Video or…..?
    a. Q and A with prizes and clapping, OR
    b. Group or team scenario challenge/activity/learning game
14. Comprehensive Check for Learning (C4L) and Prizes
15. Action Items/commitments/Accountability Buddy
16. Review the objectives for completion (Did we hit all the objectives? Did we leave anything out?)
17. Completion acknowledgment - Certificates in exchange for smile sheets, music, clapping for winners, etc.; group photo
18. Thank you and contact info of the instructor

CHILD WELFARE STATEWIDE TRAINING SYSTEM (STS)

Decision Making

19.

The Art of Facilitation

The Super Eight

The steps that are necessary for any meeting to be effective.

1: ***Purpose*** – Start every meeting by clearly stating the purpose of the group and of this specific meeting Yes, even if you said it last meeting and even if you think everyone knows – this will ground the team in a concrete purpose and set the stage for redirecting if folks get off topic.

2: ***Context*** – Set the context by explaining history of this topic briefly and checking context of participants. Give a brief headline on what has been happening with the topic and where we are in the process. Then ask how everyone is doing to see what context others are working within.

3: ***Agreements*** – Build agreements in the first meeting (even if you have them with people in the room for another project … this is a new project and new agreements are needed). Keep agreements top of mind in each meeting by referencing them as needed.

4: ***Network/Stakeholders*** – Check to be sure the right people are here. If not, assess if the meeting can continue. Check in on the roles of everyone involved. Who is facilitating, note taking, participating?

5. ***Desired Outcome*** – Define the goal or outcome we want for this meeting. Yes, even if you said it last meeting. This will ensure you have consensus on this and will keep the meeting on task.

6. ***Content*** – This will be the bulk of your meeting. Discuss what needs to be discussed (this should be clearly laid out in an agenda in advance of the meeting). Keep the team focused on the task at hand and enforce agreements as needed. Review the status of previous action items. Ask, don't assign. Use solution-focused questions. As action items are identified be sure they are behaviorally based, support the desired outcome, are assigned to a specific person who will complete them, and have a specific deadline.

7. ***Next Steps*** – Define what needs to happen next by reviewing all action items that have been developed and determine the time and date of next meeting. Begin preparing for the agenda for the next meeting by asking if there are any pressing things that will need to be addressed next time.

8. ***Plus/Delta*** – Ask what worked about today's meeting worked and what could be upgraded. Be open to feedback from the group – a good facilitator must be willing to accept the feedback and be willing to consider how to improve or enhance their own facilitation to make the meeting effective.

PCWTA is a program of the Academy for Professional Excellence at San Diego State University School of Social Work in collaboration with our University partners, CSU San Bernardino, Loma Linda University and CSU Fullerton

Stages of the CONTENT Discussion

Open Stage: Gather information	Narrow Stage: Organize the information	Close Stage: Select and agree on next steps
Use open-ended and solution-focused questions, brainstorming, and free roaming discussion. Be sure that each person has a chance to contribute and that all opinions/ideas are expressed.	Narrow the information that has been discussed by considering resources, time, and staffing needed to reach the outcome. Use consensus scale to get agreement.	Prioritize next steps that will help you to reach the intended outcome. Clearly define next steps by identifying who will do what and by when. Set the next meeting to revisit the plan.

Good Facilitation + Strong Project Management =
An Effective and Gratifying Process

Indicators of a successful meeting:

Process

Did the process used in the meeting:

- Encourage participation?
- Facilitate information exchange?
- Lead to decision-making?

Relationship

Were the interpersonal relationships characterized by:

- Openness and honesty?
- Respect and courtesy?

Results

Did the meeting result in:

- Informed decisions?
- Clear understanding of who is responsible for which follow-up tasks?
- Agreement on deadlines?

Project Management Tips:

Good facilitation helps manage a meeting; a project action plan helps manage the broader effort. Using both together leads to success and a process everyone feels good about. Use these tips to manage a project:

- Clearly define the desired outcome.
- Identify the people who are needed to reach it.
- Convene the team regularly using agreements and effective facilitation skills.
- Clarify roles of each team member.
- Determine what small goals must be set and met along the way that will lead to the intended outcome.
- Set benchmarks and timeframes for each goal.
- Assign tasks to specific team members with a specific deadlines.
- Write down the plan and all decisions/action items and review/update it in each meeting to keep the work moving forward.

Content adapted from *Effective Facilitation Skills* training by Heather Meitner, National Council on Crime and Delinquency.

THE FACILITATOR'S CHECKLIST FOR TRUE CONSENSUS BUILDING

Adapted from the #1 facilitation course, The Effective Facilitator, and bestselling book, The Secrets of Facilitation by Michael Wilkinson

- [ ] **Know what consensus means – "I can live with it and support it."**

- [ ] **Understand the three reasons people disagree.**

  Level 1: Lack of shared information
  Level 2: Different values or experiences
  Level 3: Outside factors impacting the disagreement

- [ ] **Level 3:** With disagreements based on outside factors (level 3), take the issue to a higher source for resolution – do NOT attempt to solve the disagreement during the meeting.

- [ ] **Level 1:** Use the Delineation technique to address a level 1 disagreement.

  - Start with agreement.
  - Confirm the source of the disagreement.
  - Identify the alternatives under discussion.
  - Ask specific delineating questions to each party to determine the answers to the following four key questions: How much? How long? Who is involved? What is involved?
  - Summarize the information.
  - Take a consensus check.

- [ ] **Level 2:** Use the Strengths and Weaknesses and Merge techniques to solve a level 2 disagreement.

  - Identify the strengths and weaknesses of all alternatives.
  - Select the one or two most important strengths of each alternative.
  - Create one or more new alternatives that combine key strengths.
  - Delineate the top alternative.
  - Take a consensus check.

- [ ] **Use the Weighted Scoring technique when structured comparisons and numeric values can help the team reach consensus.**

  - Define the criteria.
  - Establish weights for the criteria by designating highest, lowest and then the remaining weights.
  - Score the alternatives by identifying the most favorable scoring first and assigning all other scores relative to it.
  - Apply weights to the scores.
  - Take a consensus check.

- [ ] **When all else fails, move on! Allow some time to pass and return to the topic later.**

Get additional techniques and hands-on training in consensus building in The Effective Facilitator.

www.leadstrat.com | 800-824-2850