A Toolkit for Volunteer Leaders
Educational Design

Learning Theory E-1

We are the architects of our own destiny.

Everyone has had experiences with "education" and "learning." So this module will start with an exercise to help clarify your understanding of those two words.

EXERCISE:

Answer the following questions briefly and save the answers for later:

1. What is education?
2. What is learning?
3. Describe a learning experience that was extremely important to you. It may have taken place anywhere and lasted a few minutes or several years, but it made a lasting impression on you.

LEARNING OBJECTIVES

After completing this module you should be able to:

1. Define education and learning.
2. Describe three different types of education.
3. Describe conditions which encourage learning.

WHAT IS EDUCATION?

Most people equate "education" with schooling. Likewise "learning" is what happens in schools. The author would like to propose other definitions and provide what he considers to be a more comprehensive understanding of education and learning.

Definitions:

Education means learning knowledge, skills and attitudes. The most important of these is learning how to learn. Learning means deciding about your own life style.

3 Types:

(1) Formal = schools. The hierarchically structured, chronologically graded system running from kindergarten through university and including full time technical and professional training. Schools typically perform six functions: babysitting, indoctrination, socialization, employment of teachers, certification and teaching/learning.

(2) <u>Nonformal</u> (NFE) = any intentional and systematic educational enterprise (usually outside the school system) where the enterprise is adapted for particular students or situations in order to maximize learning and to minimize the maintenance constraints (babysitting, taking roll, enforcing discipline, writing reports, supervising study hall, etc.). NFE is characterized by one or more of the following: **learner centered, cafeteria curriculum** (options & choices), **informal human relationships** (roles of teachers and students are less rigid and often switch), **practical emphasis** (immediately useful), and **lower level of structure** than schools.

<u>Informal</u> = unplanned day-to-day experiences from which people learn. Sometimes elders, parents, employers, or peers help analyze these experiences and therefore assist with the learning.

Examples of NFE:

4-H, Scouting, Cooperative Extension, farmer training centers, mobile artisan training, literacy campaigns, apprentice brigades, self-help programs, integrated ag. development projects, community development.

General Issues:

(1) quality of education, (2) equal access, (3) local vs. federal control, (4) individual needs vs. society's needs, (5) drop-out rates, (6) expense, (7) who pays? (8) what is taught?

Learner Attitudes:

(1) is curious, (2) is able and willing to ask pertinent questions, (3) has an open mind while seeking an answer, (4) is decisive when appropriate, (5) is aware of own strengths & weaknesses, (6) is mature (accepts responsibility for learning), (7) balances optimism with cynicism, (8) judges what is worth learning, and (9) sets high standards then works to reach them.

Educator Styles:

<u>Directive</u> is when the educator initiates, structures, motivates, delegates, praises, and reprimands. <u>Democratic</u> is when she/he asks questions to involve the learner, leads discussion, encourages others to take responsibility for their learning, and confirms commitments.

<u>Non-directive</u> is when she/he refuses to decide for learners, uses silence and non-verbal support, and intentionally relinquishes power.

Effective Teaching (school):

Five qualities distinguish effective teachers. They: (1) are clear with instructions and explanations, (2) are enthusiastic, (3) are business-like in the classroom, (4) employ a variety of techniques, subject matter, & activities, and (5) provide opportunities for students to get involved in learning.

Effective Teaching in NFE:

Because of the characteristics of NFE (see bold words in first section) educators must emphasize (1) flexibility, (2) thorough preparation, (3) ability to anticipate learners' changing needs (4) willingness to adapt to learners, (5) a healthy cynicism toward institutions. Clarity, variety, enthusiasm, and learner involvement are also important.

Why Distinguish Formal Ed From NFE?

Schools Dominate our perceptions of education. They relegate learning "outside the classroom" to second-class status. They define the "teaching" role. They gobble up most of the resources available to education. In universities, extension and resident education often seem to be in conflict philosophically. Since formal education and NFE are different we must understand the strengths and weaknesses of each in order to anticipate which one will work better in a given situation. Formal and nonformal education <u>can</u> complement each other if properly understood. Most educators are biased either toward formal or nonformal education.

Readings: <u>Characteristics of Facilitators</u> (Chapter 2), A. Etling, 1975.

<u>Teaching as a Subversive Activity</u>, N. Postman & C. Weingartner, 1969.

<u>Attacking Rural Poverty</u>, Philip Coombs, 1974.

QUESTIONS FOR DISCUSSION

Do you agree with the preceding section? Why or why not?

Do you still agree with the definition of "education" and "learning" that you wrote during the introductory exercise? or would you like to modify it?

Was the learning experience that you described in the introductory exercise an example of formal, nonformal or informal education?

Are formal, nonformal and informal education equally important? Why?

Working with people in volunteer groups or community organizations is more like nonformal education than formal education. Do you agree or disagree with this statement?

Which leadership styles (see module L-1) are more appropriate to nonformal education?

HOW TO ENCOURAGE LEARNING

Peter Sheal (1989) offers ten principles that promote learning. He says that people learn best:

1. in an informal, non-threatening learning environment;
2. when they want or need to learn something;
3. when the learning caters to their individual needs and learning styles;
4. when their knowledge and experiences are valued and used;
5. where there's an opportunity for them to have some control over the learning content and activities;

6. through active mental and physical participation in the learning activities;
7. when sufficient time is provided for the assimilation of new information, practice of new skills, or development of new attitudes;
8. when they have opportunities to successfully practice or apply what they have learned;
9. when there is a focus on relevant and realistic problems and the practical application of the new learning; and
10. when there is guidance and some measure of performance so that learners have a sense of progress toward their goals.

These principles give you a checklist to tell you if the conditions for learning are positive and strong for a particular group at the time you wish to teach them. Consult module E-2 to give you a fuller explanation of nonformal education, and module E-3 to provide some principles for adult education (people who are over 21 and out of school).

REFERENCE

How to Develop and Present Staff Training Courses, Peter R. Sheal, Nichols Publishing, 1989.

This module was written by Arlen Etling.

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Principles of Adult Education E-2

An experienced person does the best work.

Adult learners are normally considered to be those who have completed their schooling (at least temporarily) and desire to learn something outside the school system. Adult learners fit more into nonformal education than formal education (see modules E-1 and E-3). While college students are adults, they are part of the formal education system. Traditionally, therefore, they are considered a part of formal education rather than nonformal education.

How do adults learn? What does this mean for educators? Below is a list of principles of adult education. After each principle the implications for the learners and for the educators are noted.

LEARNING OBJECTIVES

By the end of this module you should be able to:

1. Describe adult learners in terms of learning style preferences.
2. Tell how adult learners are similar and different than students in school classrooms.

EIGHT PRINCIPLES

1. The teaching/learning process is dynamic, interactive, and cooperative. A two-way interaction between learner and educator is necessary. The educator does not simply "fill up" the passive learner with "education." Both the learner and the educator must accept responsibility for the learning. The learner must participate actively and willingly. The educator must also be a learner. Sometimes the learner, due to previous experience, teaches the educator. The adult educator is responsible for teaching the learner how to learn. Sometimes this is more important that what to learn. The learner has a right to know what is expected by the educator who must make this very clear to the learner. In addition to using strong skills in verbal communication, the educator must be an effective listener. The educator must provide facts and resources that are relevant to the learner. The learner must relate these facts and resources to previous experience in such a way that meaningful learning occurs.

2. Persons are more important than the subject being taught or the teaching/learning technique being used. Factual information is useless unless it is of value to the learner. When the learner decides to accept the learning that means a lifestyle change. The key to learning is what happens to the learner. This means that the educator must know the learner. Likewise the learner just open up to the educator and help that educator to know the learner. The educator must strive to make the learning relevant to the learner. The learner must accept equal responsibility with the teacher in making the learning relevant. The educator must be patient. The pace of the teaching depends on the pace of the learner. The learner must make an effort to learn; must try to stay with the educator and must signal the educator when the pace is too fast or too slow. The

educator must begin where the learner is ready to begin and must strive to create maturity in the learner. Maturity is the ability and willingness to take responsibility for the learning. The learner must accept the need to mature. Both educator and learner must be flexible for this relationship to be effective.

3. Responsibility for teaching and learning is shared by both the educator and the learner. Both the educator and learner must b-e cooperative and helpful. Although learning is an individual decision by the learner to change his/her lifestyle, learning often occurs in social settings where others can assist in the learning. The educator never does anything for the learner that the learner can do. The learner does not depend on the educator unless absolutely necessary. The educator must be sensitive to learner readiness. Some motivation may be necessary. The learner accepts some of the responsibility for readiness and self-motivation. The learner must make decisions about the learning and not leave these decisions to others. The educator must assist the learner in making decisions and avoid making decisions for the learner. The educator must not ask the learner to do anything that s/he, the educator, would not do.

4. The procedures used for teaching/learning must be determined by the learner's goals. The educator must involve the learner in setting goals for the learning. Then the educator must help make to learner aware of learning resources to meet those goals. The learner must learn how to select resources and take responsibility to use those resources to meet the goals that have been set.

5. Ideally learning involves not just information but also skills and attitudes. Learning implies change. Sometimes change means recognizing attitudes that inhibit learning. The educator must help the learner to identify attitudes that need to be changed. The learner must recognize that changes of attitudes can be beneficial. Both must move from the cognitive (informational) aspects of learning to emphasize skills and attitudes. They must identify skills and attitudes that are important and work together to learn these. All information should be judged by the criteria, "what will the learner do with this information that has been learned... what difference will it make to the learner's lifestyle?"

6. Both learners and educators must be willing to progress from a supportive climate to a climate of direct challenge. Both educators and learners must recognize that the adult learner has had many experiences which have formed a body of knowledge, strong feelings, prejudices, and probably some misconceptions. Both must create an open supportive environment where the learners accept themselves and understand why they behave as they do. Then they must challenge those experiences and beliefs to move beyond those that no longer serve ones lifestyle. This process must be gradual with great sensitivity on both sides. An abrupt challenge to an insecure adult may end the learning process and even ruin the relationship. The educator must try to never put the learner on the defensive. The learner must recognize when s/he is defensive. Both must interact openly, in good faith, and creatively resolve any conflict which arises. Both learner and educator must view the educator as a guide. At times the learner may reject the guidance and this position may be positive. The educator must be sensitive to the learner's needs and readiness to accept guidance. Both must build strong rapport based on honesty and empathy. Then both must be open to challenge, by the other person, in order to consider new ideas, new options, and new relationships.

7. Evaluation should take place continuously in the teaching/learning process. An evaluative climate in which both the educator and the learner are receptive to new perspectives on themselves and willing to evaluate themselves, is important. The learner needs feedback from the educator in order to make progress. Both need to evaluate the learning climate as well as learning outcomes. Both must be flexible and cooperative in making adjustments to the learning climate whether it deals with information, skills, attitudes, or a combination of these three aspects.

8. Learning takes place when learners interact positively with each other. When learners create a positive learning climate in a group of learners, progress can be more rapid and more significant. Trust, security, and mutual confidence must exist to support learning in groups. Competitive aspects of learning (getting the highest grade) should be eliminated. The same relationships between educator and learner, discussed above, must be developed among the learners in the learning group.

QUESTIONS FOR DISCUSSION

1. How is an adult learner different from a student in primary school? From a student in high school? From a university student?

2. How are they similar (in each case)?

EXERCISE:

Look (again) at a community group that you wish to teach. If possible use a group of adults. Write down a list of guidelines to help you use principles of adult education with this group. For example, "I will take more time at the beginning to get to know each member of the group that I am teaching." Share your list of guidelines with a partner or with the members of your learning group to get their response. Discuss how you are going to put these guidelines into practice. Incorporate your guidelines into your lesson plan (if you are not familiar with lesson plans, look a modules C-8 on using teaching/learning techniques or module LT-1 on organizing workshops.)

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Nonformal Education E-3

School isn't the only place where you can learn.

An understanding of nonformal education is essential for any educator who works outside of the classroom. Most of our conscious educational experience comes from schools. Yet if we try to act like classroom teachers when we are outside the classroom, we are likely to have problems. This module will look at the difference between formal and nonformal education with an emphasis on nonformal education.

LEARNING OBJECTIVES

After finishing this module you should be able to:

1. Explain the difference between formal and nonformal education to someone who does not clearly understand the difference.
2. Plan and teach a topic in a formal classroom and in a nonformal educational setting (i.e. an extension workshop).

WHAT IS NONFORMAL EDUCATION?

According to Philip Coombs (1973) it is

> ...any organized educational activity outside the established formal system--whether operating separately or as an important feature of some broader activity--that is intended to serve some identifiable learning clienteles and learning objectives.

Nonformal education is difficult to define satisfactorily, and some educators even feel that definitions confine more than clarify. Since nonformal educational activities are numerous and diverse, a single definition which applies to all is difficult to develop. Further, because education too often tends to be thought of in terms of schooling, we must be careful to state our assumptions so that this misconception is avoided.

Certain key dimensions can be identified for particular nonformal educational settings. These dimensions are contextual. They may vary from one educational setting to another. A review of literature on the theory and practice of nonformal education found that six dimensions tend to dominate .

1. <u>Learner-centered</u> means that emphasis is on learning rather than on teaching. The learner participates in determining educational objectives and exerts substantial control over content and method. Attitudes of self-awareness and power to control environment are fostered. Local initiative, self-help and innovation are encouraged in order to equip learners to analyze critically and take action to resolve their own practical problems.

2. Cafeteria curriculum (options, variety and flexibility) is featured in place of the sequential, prescribed curriculum associated with schools. Curriculum is generated primarily by learners. A strong entertainment feature is included. Examples include local radio, village newspapers, market day exhibits, posters, mobile libraries, drama, role play, games, puppets and epic narrative. Resources and skills need not be imported or professional.

3. Informal human relationships are essential. Learners and educators are roles which, ideally, switch back and forth among participants. Informal relations based on mutual respect are necessary if education is to be learner-centered and if learners are to choose from a cafeteria of learning opportunities. While this value position is often difficult for professional teachers to accept, local nonprofessional "facilitators" who see their role as catalyst, helper, or enabler are often more effective than lecturers or academics.

4. Reliance on local resources means that costs are kept low without sacrificing quality, that both conventional and unconventional sources are used, and that available resources are deployed efficiently. Expensive technology is not necessary and often undesirable. Because learners often bear part of the costs, higher motivation and greater program accountability usually result.

5. Immediate usefulness refers to educational content and methodology directly related to learners' life styles. Formal schooling often has a delayed impact through its orientation to future application. Nonformal education should involve short term activities with a present time orientation and immediate impact.

6. Low level of structure is necessary when local situations vary tremendously between and within themselves. Since a high level of structure means a high level of control, learner-centered approaches, informal human relationships and immediate usefulness are all difficult under tightly controlled situations. Flexibility is sacrificed for control. But flexibility is necessary for the needs of individuals, subcultures, and minorities. Voluntary organizations and amateurs who learn on the job are favored over governmental programs featuring bureaucratic approaches managed by civil servants. Decentralization is necessary to allow local approaches to local problems.

If these six dimensions are carefully considered by nonformal educators, participatory planning and decision making will be much easier. These dimensions need to be considered in the structure of the educational organization, in its mission statement, in its choice of priorities, in its inservice training of educators, and in its use of educational methods and techniques. To be truly effective in the future, nonformal educators will need to shape their organization, both at the national level and at the local community level, to be flexible in responding to the needs of clients rather than requiring clients to adapt to a rigid and unresponsive organization.

Educators will need to give special attention to the way educational programs are planned. The steps in program planning (see module E-4) do not change with formal and nonformal education. The involvement of people and the techniques used to plan programs collaboratively, however, are strikingly different.

QUESTIONS FOR DISCUSSION

1. Extension agents and other nonformal educators often have difficulties when they try to teach a class in a formal educational setting. Likewise, classroom teachers often have difficulties when they try to teach a group of youth or adults who are not part of a formal class. Why is this?
2. Can an educator develop skills to move effectively between the formal classroom and nonformal educational settings?
3. How will this educator behave differently in each setting?

EXERCISE

Chose a topic with which you are very familiar. Write a plan for how you would teach that topic to a group of adults who have finished their formal education and just want to learn about your topic. Then write a second plan for teaching the same topic in a formal classroom for 50 minutes. If you have never written a lesson plan for a class or a workshop you may want to look at module C-8 (using learning techniques) for a format to plan a class. The module on workshops (LT-1) gives you two different planning formats.

EXERCISE:

Teach the topic that you have just planned in a classroom and in a workshop. Have a colleague evaluate you using the instruments found in E-10 for a workshop and for a classroom session. If possible have a teacher, who is recognized as an effective classroom teacher, evaluate your formal presentation. Have an effective extension agent (or other professional nonformal educator) evaluate the workshop.

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Program Planning E-4

By trying to do too many things, you end up with nothing done very well.

Program planning is a process which takes you from ideas to action and then to an evaluation which tells you if (or how well) you were able to accomplish your ideas. In "moving from ideas to action," you first need ideas, then you must put them into action. Module E-5 shows you how to identify the educational needs of a group, organization or community. This module will help you generate ideas. Module E-6 will show you how to determine priorities from the ideas. Module E-7 will give you practice in writing objectives. Module E-8 will give you specific techniques for assessing resources to tell you if your objectives are realistic. Module E-9 then shows you how to put all of the work of these other modules into a written plan. Module M-2 describes how to implement a written plan and module E-10 describes how the plan can be evaluated. To become competent in program planning you will need to complete each of these modules.

This module will briefly review the steps in program planning. It will show the relationship of the seven steps and the importance of each step to the program planning process.

EDUCATIONAL OBJECTIVES

After studying this module you should be able to:

1. Explain the essential steps in "moving from ideas to action."
2. Describe how each of the seven steps is related to each other.

MOVING FROM IDEAS TO ACTION

Why are some groups able to plan and complete one project after another? Why do others seem to get little accomplished except complaining and bickering? Why are outsiders sometimes able to quickly help a community identify problems and plan solutions which have perplexed local people for years?

Part of the answer to each of these questions is in knowing how to organize and what steps to follow. The process outlined below is one way to guide leaders and workers through the essential steps to project accomplishment.

Basically, this process is like any planning process with one key difference. This process cannot work without complete collaboration on the part of all people involved. Assumptions about the community and decisions for it must be made openly by community members. Leading a group through this process means guiding, not controlling, so that ownership of the project stays where it belongs--with the people, not just with the "leaders."

Identify Issues - <u>Step I</u>

Find out what is on people's minds--their concerns, needs and wants. Write these issues down, checking with the person who suggested each one for clarification. Include as many people as possible in this step. Take plenty of time to be certain that <u>everyone</u> has been encouraged to express <u>all</u> concerns. Several sessions and more than one technique may be needed to carry out this step.

Techniques which may be used to identify the issues include brainstorming, the nominal group process, a community survey and force field analysis. These techniques must be used correctly to be effective.

Set Priorities - <u>Step II</u>

Now separate needs from wants. People who are emotionally involved in an issue may confuse their own "wants" with community "needs." Sort out issues that are important to only one or two people. Focus on the really important issues. Determine which is most important, second in importance, third...etc. Then decide the correct sequence for attacking the top priorities. In most cases, the nominal group process is the best technique for setting priorities. Others which may be considered include an attitude survey, group discussion and consensus building.

Again, involve as many people as possible. At least be certain that all viewpoints are represented in the group which is setting priorities.

 Set Goals and Objectives - <u>Step III</u>

Determine what needs to be done about each priority and state that as a goal. Then break the goal down into more specific objectives. Here is an example of how this worked in one community organization:

Issue - Tourist accommodations are inadequate.

Goal - Provide more tourist accommodations.

Objectives -

> 1. By June 1, a local sales team will be formed by the town.

> 2. By December 31, a contract will be signed by the Town Council and the motel chain specifying agreements to construct a motel.

A goal is a general statement of intent. An objective tells <u>who</u> will do <u>what</u> by <u>when</u>. Well-written objectives are challenging, realistic, specific, measurable, simple, and not too confining.

Assess Resources - <u>Step IV</u>

What human, financial, and physical resources are available to carry out the objectives? If the resources are inadequate, for any reason, then the objectives may need to be rewritten to make them more realistic.

Techniques which may help assess resources include a local resource inventory, public meeting, or discussions with individuals who are aware of the area, state, and federal resources. Communities should overlook neither local nor outside resources.

Form a Plan - Step V

Once the available resources are in line with the objectives, a plan should be written down. People involved will want to discuss alternative strategies for meeting the objectives. The plan represents the best alternative.

The objectives as well as activities for meeting the objectives should be included in the plan. The plan should specify individuals' responsibilities and a time by which each activity will be completed. The plan coordinates all of the resources so the overall goal is accomplished logically and efficiently.

In delegating responsibilities, keep in mind that some people are willing to help plan, some will legitimize, some will provide resources, and some will be workers. If planners are called on to be workers, they may rebel and fail to deliver. Using people in the wrong roles is a common mistake. Be sure people are committed to do specifically what the plan requires of them.

Implement the Plan - Step VI

Constantly refer to the written plan to guide the work. Techniques needed at this point include effective communication, conflict resolution, group dynamics, and publicity. If the plan has been carefully written, individuals who have the necessary skills will have the responsibility to use those skills at the right time.

In some communities, people lack some of the critical skills or at least the confidence to use them. In that case, the community should organize training to develop necessary skills before plunging ahead.

Evaluate Results - Step VII

Encourage feedback from everyone who is involved. As people implement the plan, they will invariably run into snags. Everything cannot be anticipated in the plan. At this point, it may be desirable to adjust the plan to make it more realistic before proceeding. Maintain an attitude of flexibility which will enable minor adjustments or, if necessary, a major adjustment where the entire plan must be rewritten due to a major snag.

When you think the project is completed, check the objectives to be certain nothing has been overlooked. You may want an outsider to conduct a formal evaluation in some cases. You will at least want to record what you did, right or wrong, to improve chances of success on future projects.

Other Considerations

The process described above is sequential. Step three cannot be accomplished until steps one and two have been done. However, once you get into step three, it may change your thinking on steps one and two. When you backtrack to make changes, follow the effects of those changes through each succeeding step.

In any educational program, readiness is an issue. The best plan will have little chance of success if people aren't ready for it. Finally, use consultants if they are available. Don't get into the rut of trying to do too much by yourself. Ask for help and use it.

QUESTIONS FOR DISCUSSION

1. What happens if you skip one of the steps? How will that omission affect the process? ...the success of your group in accomplishing its ideas?

2. Which of these steps is most commonly ignored by the groups, organizations or communities in which you work? Why?

3. What personal actions can you take to help these groups to be more productive, more interesting to its members, and more useful to the larger community of which it is a part?

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Needs Assessment E-5

We all view life in terms of our own wishes.

Needs assessment is the first step in the program planning process (see module E-4). We use needs assessment techniques to discover what people need. Usually their wants are mixed in with their needs. We will be able to identify the group's priorities when we complete the priority setting session that is described in module E-6.

LEARNING OBJECTIVES

When you finish this module you should be able to:

1. Define needs assessment.
2. Identify six techniques for assessing the needs of a particular group.
3. Plan a needs assessment that uses one of the techniques.

A DEFINITION

Needs assessment is: *a systematic process for documenting relevant needs.*

Every word of this definition is important.

THREE CRITICAL QUESTIONS

In order to conduct a needs assessment you have to answer three linked questions: **Who** needs **What** according to **Whom**? **Who** refers to the target group of clients. **What** refers to their needs. **Whom** refers to the informants who have reason to know the needs of the target group.

EXAMPLES OF TARGET GROUPS AND INFORMANTS

Target groups	Informants
4-H Youth	me
new	4-Hers
junior	non 4-H youth
senior	parents
urban	adult leaders
future	4-H agents
prospective members	4-H specialists
droupouts from 4-H	agencies for youth
families	donors
volunteers	critics
4-H staff (secretaries)	

NEEDS ASSESSMENT TECHNIQUES

To determine the needs of a group we may use one or more of the following techniques:

1. group discussion (ask a group what they need and record the answers),
2. brainstorming (see module LT-*),
3. nominal group process (see module E-6),
4. resource inventories (see module E-8),
5. census data (from government census office or from school district office),
6. evaluation results (from previous programs),
7. informal interviews (as people express their needs in your office or on the street),
8. formal interviews (planned questionnaire completed in your office or over the phone) and
9. written surveys.

Examples of 8 and 9 accompany this module. After using any of these techniques the results can be summarized on a sheet of paper that has three columns:

Who -Needs What - According to Whom?

QUESTIONS FOR DISCUSSION

1. Which technique will you use to assess the needs of a group, organization or community of which you are a member.
2. Why did you choose this technique?
3. Is it the most appropriate technique for your group considering the situation?
4. Should you use more than one technique to be sure of the needs?
5. Do you have the time and other resources to use more than one technique?

EXERCISE:

Do a needs assessment. Work with a partner. Choose a small group or organization to keep the needs assessment as simple as possible. Records the results of your needs assessment. What did you learn form the needs assessment (the process as well as the results).

NEXT STEPS

Now that you have identified the needs (issues) of a group, you are ready to set priorities. Move on to module E-6.

RESOURCE

Etling, A. W. (1994). Needs assessment for extension agents and other nonformal educators. University Park: Cooperative Extension, College of Agricultural Sciences, The Pennsylvania State University.

INSTRUMENTS

Two examples, a phone interview and a written survey, come from the resource listed above. Contact the author for copies: aetling@unl.edu

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Setting Priorities E-6

People are more willing to do the legwork if they are also involved in the planning.

Before beginning this module you should review the program planning process (module E-4) and complete module E-5 (needs assessment).

Now that you have identified the needs of the group with which you are working, you have a list of ideas (needs). You cannot hope to attack all of the needs at once. You need to set priorities. Don't try to do this alone. Involve a representative group of people (including representatives of those individuals who are most knowledgeable about the group's needs and those who are most affected).

Generally, people are more willing to do the legwork if they have had a say in the planning. Rarely do people get as excited about someone else's idea as they do about their own. Taking time annually at the start of the program year to convert individual needs and concerns into group priorities (goals) not only provides needed direction for the organization but also can be a motivational experience.

LEARNING OBJECTIVES

After finishing this module you should be able

1. To describe the "nominal group process."
2. To lead a priority setting session using the nominal group process.

A GOAL SETTING PROCESS

There is no single best way to set goals. Goal setting can be as simple or as involved as you wish to make it. A simple process is described below. This process should help you tailor a goal setting exercise to the circumstances and needs of your group.

This process is patterned after a goal setting technique called "nominal group process" developed by A.H. Van de Ven and A.L. Delbecq of the University of Wisconsin, Madison. It provides a structured process which allows people to express their individual priorities, and then converts them to group priorities. If those present will agree to follow a few simple yet firm rules, the process can be extremely effective--even when disagreement and controversy are present. The process maximizes the creativity and input of each participant, and produces more and higher quality suggestions than ordinary group discussion. It also prohibits any single speaker or topic from dominating the meeting.

Set the Stage. Take time to explain goal setting, and its value, to the group. Set a date and time for your goal setting session, preferably of two hours duration. Ask members to prepare for the meeting by clarifying in their own minds what they would like to see the group accomplish during the coming year. The setting of group goals is difficult until the individuals involved have first set personal goals. Ask members to take time to clarify for themselves what is important to them and how they want to spend their time, within and outside this group.

Prepare: Arrange for a comfortable room, large enough to hold the expected number of participants in such a manner that tables seating 5-8 persons can be placed adequately apart for independent group activity. Arrange to have one Group Leader/Recorder at each table, and an overall coordinator for the meeting. The following supplies are also needed for each table: six to eight large sheets of newsprint(*), four or five 5 x 8 index cards per person, a broad felt tip marking pen, masking tape, pencils and an easel with a back (handy, but not essential). (* Sheets of newsprint, approximately 28" x 32", can be acquired from your local newspaper or office supply store. Butcher paper or the paper used to cover tables can also be easily cut into the size of sheets needed. A blackboard could also be used.)

At the start of your goal setting session, clarify the task, the specific question(s) to be discussed. Write out this task on newsprint or a blackboard for all to see. For example, "What are the two or three things you would most like to see the group accomplish during the coming year?" or "What would you like to see the Chamber of Commerce do toward expanding tourism?" or "What should be emphasized in the 4-H program during the coming year?" or "What are the principle concerns of the farmers in the county?" The wording of the problem, question, or task is crucial in obtaining the focused response desired of participants. Before the meeting, the organizers should determine precisely the wording of this task. Make it simple, clear and straightforward.

If the group is larger than ten, break into small groups of five to eight. Ask each small group to go through this exercise independently, and then share its small group recommendations with the larger group at the end of the session.

Individual Writing Exercise: Pass out index cards or sheets of paper. Have each person jot down suggestions in response to the question (task) before the group. Individuals are to work alone and in silence. This individual writing exercise gets each person's concerns and desires down on paper, and thus ensures input from everyone. It helps people clarify in their own minds what is important to them. It is much easier for people to write something down and then read it than it is for them to speak spontaneously. Ask participants to limit their suggestions to what they wish to commit themselves to accomplish during the coming 12 months. Break large goals into specific activities that can be completed this year.

After everyone has completed the writing exercise, you may want them to go back and rank the items each has listed, in order of personal preference. Place a "1" by your first priority/biggest concern, a "2" by your second, etc.

Round Robin Sharing: Have everyone in turn read what s/he has written. Prohibit group discussion during this period, except for questions of clarification. The purpose of this segment is to share, to listen and to understand and appreciate the opinions of others. The pros and cons of each will be discussed later. The round robin insures input from everyone, encourages people to speak up without fear of being criticized or put down by others in the group, and it keeps individuals from dominating the discussion.

As it is shared, list each suggestion on newsprint or a black-board. When you fill a sheet, tape it to a wall for all to see. The Recorder should take care to list each idea as stated and not try to categorize or restate the individual suggestions. The process of listing gives the participant

immediate recognition, guards against miscommunication, and serves as an official record of the meeting. Each idea should be numbered, in sequence, for later reference.

Have each person in turn read the #l suggestion only. If their first suggestion has already been mentioned by another participant, they should read their second suggestion. Then go around the room again for every- one's #2 suggestion, etc. This facilitates priority setting. Continue the round robin until all ideas have been expressed.

Set Priorities: After each person has shared suggestions for the goals and objectives of the group, the session is now, and only now, opened to group discussion. Participants can now clarify, lobby for or defend the listed statements. Set a time limit, preferably 15-20 minutes. Keep the groups aware of how much time is left.

After the period of discussion ends, everyone votes. On a clean index card, have each person write FIRST VOTE in the upper right hand corner. Then, using the numbers assigned to the statements in the preceding step, everyone ranks the top three items listed on the large sheets. Individuals must work in silence.

Scores should be tallied by the Group Leader. (This is a good time for a 5-10 minute BREAK.) Give a score of three to each individual's top priority item, two to each second priority, and one point for each third place vote. Record these scores on the master list. Highest overall score is considered the item of highest priority, the second highest score is second priority, etc.

Call for reports from each of the small groups. Identify commonalties, and star (*) those statements that have the greatest support among all group members. Review each of the starred (*) statements. Ask, "Is it the consensus of the group then that this should be one of the priorities we focus on during the coming year? Is there anyone who is not comfortable with this priority?" If there are objections, modify the statement to meet the group's approval.

If there is not an obvious consensus, you might wish to undertake a second voting after a period of debate. The second voting is just like the first except that each participant votes for his/her top three ideas from all of the lists on the wall (the lists from all of the small groups).

Program planning is meaningless unless priorities are set. By setting priorities, a group concentrates its limited time and resources on those actions which are most important to it. Very few organizations are able to focus on more than two or three priority items at once.

AFTER THE PROCESS

Put in Writing and Distribute Widely: Assign to someone the task of writing the formal goals statement. Such writing is best not done by committee. Assign each of the top priorities (2-5 of the highest priorities) to someone to turn the priority into a general goal. This goal will tell who does what (action or activity) by when (date or deadline) but not in any great detail. After the goals statement has been prepared, it should be discussed and approved at a regular meeting. Then you are ready to turn the general goals into specific objectives (see module E-7). Once your goals and objectives have been formally adopted by the group, make sure all members are provided with a copy. Mail a copy to all possible supporters, e.g., city council, local newspaper, and state agencies. Formally review your goals and objectives at least quarterly.

Update Annually: If group opinion changes, modify your goals to reflect it. When a group's objectives fail to keep up with the changing needs and interests of its members, they drop out or become spiritless and apathetic.

In conclusion, priority setting can be an invigorating exercise, if done properly. When people have the chance to share ideas and to be directly involved in setting priorities for the group, they assume greater ownership of the goals set, and are generally more committed to carrying them out. When goals are set for the group by its officers or board of directors, the level of commitment is not the same. Often we try to speed up the goal setting process. Only the most vocal members have their say, and the remaining members feel railroaded. They then sit back and let the officers do the work.

The above process can be easily modified to fit the constraints and desires of the group. If time is limited, the round robin exercise alone can be very productive. If you short-change the process, however, benefits will be lost. The biggest mistake groups commonly make is to do goal setting in one large group. In groups larger than ten, it is physically impossible for everyone to make input and to be directly involved in the discussion (within reasonable time constraints). Most of the motivational dynamics is lost with groups larger than ten. Instead, break into small groups of five to eight to complete the exercise.

FACILITATING THE GOALS PROCESS

Goal setting will be a motivating experience only if someone takes the responsibility to make it so. A facilitator should be selected to guide the goal setting process. The facilitator strives to enhance the dynamics of the exercise. The facilitator remains neutral, controls the process but does not participate in or try to influence the content of what is decided. The facilitator's tasks include:

Set the stage. Introduce the concept of goal setting and describe its potential value to the group. Help the group design a goal setting exercise tailored to its particular needs, circumstances and time. Insure that the questions (tasks) to be addressed in the goal setting exercise are clear.

Orient participants as to what to expect in the goals meeting. Urge participants to prepare, to have clear in their own minds what they would like to see the group accomplish.

At the start of the goals session, explain how the session will be conducted. Serve as a "traffic cop" in ensuring that the prescribed process is followed, that everyone has an equal opportunity to make input with no one dominating, and that no one is put down or criticized for any suggestions. (People often do not speak up for fear of being disagreed with, criticized or made fun of by others in the group.)

Strictly enforce the ground rules, e.g., no discussion during the round robin. Keep the discussion moving by calling on each person in turn. "John, what do you suggest?" Encourage and give recognition: "Good idea." Record all input on newsprint or blackboard for all to see.

Prepare a written statement of the priorities set, to be reviewed, modified and adopted at the group's next meeting. Once adopted, distribute copies to members and other interested parties.

Below is an outline that you can follow when leading a nominal group process (NGP).

A FACILITATOR'S OUTLINE TO CONDUCT NGP

Introduction The purpose of this process is to identify needs of youth in Blizzard County for the next 12 months. Nominal group process is a tested and refined process that works. It is structured into steps. Staying on time is important. Rules will be followed to ensure opportunities for everyone's opinion. We will move from individual opinions to group priorities. We need your serious effort, cooperation, and trust. The statement we are addressing is: "By this time next year

the following needs of youth in our county should be met."

This process will consist of seven steps which are .....(see below).

Step 1 - Individual Writing (5-10 minutes) Write as many brief (2-5 words) answers to the statement as you can.

Step 2 - Small Groups List Individual's Answers on Newsprint (10-20 minutes) Break into small groups of 5-12 individuals. Use a round robin--each persons gives one response in turn. The discussion leader (or a recorder picked by the leader) writes the response on the newsprint and gives it a number. Keep going around the group until each person has all ideas listed (no duplication). No discussion, elaboration, evaluation, or comments are allowed. Move quickly.

Step 3 - Small Group Debate (15-20 minutes) The ideas on the newsprint now belong to the group. You may now clarify, lobby, defend or attack ideas (not people). Which ideas are most important for the group to address this year? We will vote in 15 minutes so this is your chance to convince others of what is important. Please be brief in your comments in order to give everyone plenty of chances to speak. Do not repeat the comments of others even if you strongly agree.

Step 4 - Small Group Votes (5 minutes) Time is up, we are now ready to vote. (Handout a new index card of another color to each group member.) Mark your card 1st- then put the number of the idea from the newsprint that you think is most important. Under 1st, write 2nd- followed by the number of the idea from the newsprint that you think is second in importance. Then write 3rd- and record your third place vote. If you vote for more than three ideas your vote will not be counted.

Coffee Break While Votes Are Counted (10 minutes) The small group leader picks an assistant to read the votes and records them, in pencil, on the newsprint beside the ideas receiving the votes. A first place idea gets 3 points; a second place idea gets 2 points; and a third place vote gets 1 point. Add the points for each idea. The idea with the most points is the #1 priority. Number all of the priorities in order until you have a top 10. Then quickly rewrite the top ten priorities, in order of priority, on a clean sheet of newsprint.

Step 5 - Reports And General Discussion (15-30 minutes) Each small group leader reads the top 10 priorities for the small group. Do not give any additional explanation unless absolutely necessary for clarification. The meeting facilitator then thanks the small group leaders and asks if any of the ideas are duplicated by more than one group. Duplication is eliminated by crossing off duplicate ideas.

Now we will debate all of the ideas on the newsprint, just like we did in the small groups, and vote again in 20 minutes. Please follow the same debate rules that we used for the small groups.

Step 6 - Vote And Tabulate (10 minutes) (Hand out a new card of a different color.) Vote for only your top three ideas from all of the ideas now before the group.

Step 7 - Announce Results And Wrapup (10 minutes) Our top ten priorities are the following..... How many do you think we can accomplish in the next year? Who would like to volunteer to write the first priority as a goal that tells what actions should be taken, by whom, by when, in order to address the priority? Who would like to work on priority #2? Priority #3? Enough?

The goal statements will be presented at our next regular meeting for discussion and approval. Thank you all for your cooperation. This has been a very productive meeting thanks to you.

EXERCISE:

Work with a partner to plan and conduct a nominal group process. You may want to use a group of volunteers to role play members of your organization before you try the process in a live meeting.

QUESTIONS FOR DISCUSSION

1. Did the process work for you and your group?
2. Were any modifications necessary?
3. Do you now feel confident to lead the process with other groups?

Writing Objectives E-7

A strong rooster can sing in any chicken coop. (a weak plan won't work anywhere)

Relevant objectives can be written only after issues are identified (module E-5), then turned into priorities (module E-6) which are then stated as goals. These steps are described in module E-4 on program planning. You may wish to read (reread) those modules. Completing module E-6 will give you a set of goals (general statements of intent). Now you are ready to turn these goals into specific objectives which will be the key part of the plan of work that you write in module E-9.

LEARNING OBJECTIVES

After completing this module you should be able to:
1. Describe the criteria for a useful specific objective.
2. Identify objectives which do not meet the criteria.
3. Write specific objectives which can be evaluated.

EXERCISE:

Write from 1 to 3 specific objectives for each goal. To get started, look at the objectives described in step III of the program planning process described in module E-4. You may also refer to the "learning objectives" at the beginning of this module. Use the check sheet below to evaluate each objective and rewrite until each objective meets all criteria on the check sheet. Work with a partner to evaluate the objectives that you have written alone. Be patient if this exercise seems unnecessarily detailed and boring. Do not cut any corners.

CHECKLIST TO EVALUATE OBJECTIVES

The objective should be:
1. <u>Clear</u> - anyone in your organization can understand it.
2. <u>Challenging</u> - requires some effort.
3. <u>Realistic</u> - does not require more time or resources than you have.
4. <u>Specific</u> - it states <u>who</u> does <u>what</u> by <u>when</u>.
5. <u>Observable</u> - accomplishment of the objective can be observed; there is no doubt that the objective has been met.
6. <u>Measurable - accomplishment of the objective can be measured (you can say that it was 100% accomplished, 50% accomplished, etc.)</u>
7. <u>Simple - complexity is no virtue in writing objectives.</u>
8. <u>Not too confining - there is some flexibility to allow for changes in the overall situation. If the objective can only be achieved under optimum conditions, then it is too confining.</u>

IN CONCLUSION

Writing objectives is boring to some people who don't like detail work. However, objectives are the key to any plan. Without clear, specific objectives, members don't know where your group is

heading. At the very least, you will have a fuzzy plan of work; at the worst you will have complete chaos with everyone going in different directions and getting in each other's way. Objectives are critical in moving from ideas to action. So don't ignore or downplay objectives.

NEXT STEPS

Later you will use the objectives as a part of your plan of work (module E-9 and then to evaluate progress (module E-10). The next step in program planning, however, is to assess resources (module E-8). If the resources that you have (or that you can get) are not sufficient to accomplish the objectives that you have written, then you will need to rewrite those objectives to make them more realistic.

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Assessing Resources E-8

Be careful with your pennies and you will have plenty of dollars

This module can be studied on its own if you only want to learn some techniques for helping your group, organization or community identify the resources that exist within. The module, however, is a part of a sequence of steps on the program planning process. To understand this module as a part of that process you need to review (or do) modules E-4, E-5, E-6, and E-7.

LEARNING OBJECTIVES

After completing this module you should be able to:

1. Describe five techniques for locating resources.
2. Select and adapt one or more of the resource assessment techniques to your group, organization or community.

TECHNIQUES FOR ASSESSING RESOURCES

After you have written specific objectives for the group with which you are working (see module E-7) and before you develop a written plan, you need to make sure that you have the resources to carry out your objectives. If you do not, then the objectives may need to be rewritten or some may need to be dropped.

You may, however, have more resources available than you think. Some groups keep an inventory of resources and add to that inventory constantly.

Different organizations use different techniques to inventory resources. Examine the following examples which are described below and found on the following pages.

A. 4-H Parent Interest List - Parents are an often unused resource in youth groups. This questionnaire asks parents to check skills and resources that they are willing to share. Could your group use a "spouse" interest inventory? (See the next page)

B. Community Church Needs - This inventory is posted on the church bulletin board. The pastor reports that he is continually amazed at what he gets merely by asking.

C. Inventory Wall Chart - A civic organization in a small community uses this wall chart on a large piece of poster board to keep track of resources. Periodically, it is brought to meetings and updated (resources added or deleted).

D. Notebook of Resources - The Chamber of Commerce in a small town keeps track of resources in a notebook. The Vice President is assigned to keep the notebook current. Whenever a resource is identified, the Vice President has someone fill out the notebook form.

E. Inventory Worksheet for Committees

4-H PARENT INTEREST LIST

Please check the things you are willing to do if your 4-H club needs them.

_____Encourage my son or daughter to participate in community, as well as project 4-H clubwork and we will participate as a family with the club as much as possible.

_____Lend kitchen, backyard, living room or garage for an occasional meeting.

_____Help provide light refreshments. (Your son or daughter serves them. A committee helps with clean-up.)

_____Share a special interest or hobby with the group. Name the interest:

_____Help in a car pool for transportation to 4-H meetings.

_____Chaperone and/or provide transportation for a tour, picnic or party.

_____Help telephone parents for last minute announcements.

_____Encourage my son or daughter to start and complete projects on time. I will take an active interest in him (her) and encourage pride in his (her) own achievements.

_____Urge my son or daughter to attend all meetings or to notify both host(ess) and leader if unable to attend.

_____Assist 4-H project leaders. . .List:

My Hobbies:

Other volunteer interests:

4-H Committees

Exhibits

Clerical

Ticket sales

Hostessing

Program planning

4-H Camping

Fine arts

Assist at Fair

Registration

Local 4-H Committee

4-H Tours

Host 4-H member at Civic Club meetings

NAME

PHONE

ADDRESS

NAME OF SON OR DAUGHTER

COMMUNITY CHURCH NEEDS

Our church or individual members need the following items. If you can provide them, or have any suggestions, please leave your name and number.

I can provide it !! I would accept the following <u>payment:</u>

<u>NEEDS</u>	Name	Phone
Part-time secretary 5 hours/week		
1 used refrigerator for parsonage		
Babysitter for nursery on Sunday		
Someone to write news releases		
Someone to design posters and banners		
Old bed sheets for art projects		
Use of portable generator for three days		

----------Questions? Check with the Secretary inside.----------

INVENTORY WALL CHART

Organization or Individual

Volunteers

Funds

Equipment

Supplies

Facilities

Expert Advice

Other

NOTEBOOK INVENTORY FORM

Name of Individual or Organization: Updated (Date):

Who to contact:

Phone:

Address:

Resources Available:

People:

Name

Skills

Equipment

Interests

Facilities:

Supplies:

Services:

Funds:

Others:

What do we do for them:

Comments:

INVENTORY WORKSHEET FOR COMMITTEES

Project or Activity:

What do we need?

Who has it?

How do we get it?

Ask

Trade

Buy

Other

Questions for Discussion

1. Would any of the five examples (above) be useful to your organization?
2. Could you adapt one of these resource inventory techniques to your organization?
3. How are you going to assess resources in your organization?

EXERCISE

With a partner who is also familiar with your organization, choose one of the inventory forms. Fill it in to the best of your abilities. Then take it to other members of your organization and add more information to it. Finally, use it regularly. Update it monthly. Refer to it when you need ideas for resources.

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Writing a Plan E-9

A long journey consists of many short steps.

Before you are ready to write a plan for your group, organization or community, you must complete the other steps of the program planning process (modules E-4, E-5, E-6, E-7 and E-8).

EDUCATIONAL OBJECTIVE

When you finish with this module you should be able to:

1. Write a plan which will tell your group what needs to be done, by whom, and by what date.

EXERCISE:

You should now be ready to organize activities which meet each objective written earlier (module E-7). Sometimes one activity will fulfill several objectives. Other times, several activities will be needed to accomplish one objective.

Use the "planning worksheet" (next page) to begin a plan of work. Write down the activities (events, actions) that are needed to complete the objectives. If you need more pages, keep going.

Discuss your plan with colleagues and refine it until it appears to be complete, specific and pertinent to your objectives.

PLANNING WORKSHEET

Objective(s):

WHO?   DOES WHAT?   BY WHEN?

Responsibility   -   Agenda, Activities or Comments   -   Resources Needed

How will this objective be evaluated? When? By whom?

COMPLETING THE PLAN OF WORK

By now you realize, if you didn't already, that writing plans of work is time-consuming. You can't do it in one sitting. To write a plan of work for an organization, you must allow plenty of time and involve many people. Go back to your group's priorities for the coming year (see module E-6) and assign one priority to a committee. Ask each committee to restate its priority as a goal then write from 1 to 3 objectives using the "checklist to evaluate objectives." Then decide if you want the committee to fill out a "planning worksheet" for its objectives. You may decide to do the planning worksheet yourself or delegate the planning of all objectives to yet another committee.

Review each planning worksheet using the following criteria:

1. Is it clear (impossible to misunderstand)?
2. Are activities in a logical sequence?
3. Can the responsibilities assigned be done by the individual assigned?
4. Is the plan complete (no steps are left out - nothing is assumed to happen without being written down)?
5. Are the time lines reasonable?

NEXT STEPS

Bring the completed plan before the officers then the general membership for their approval. Allow time for debate and be willing to accept useful amendments. Then provide a copy of the final plan to each member and to other groups or individuals who are affected by the plan.

Refer to the written plan throughout the year to keep everyone working on the same priorities. Some flexibility is necessary to take care of problems and opportunities which arise after the plan is written. One purpose of the plan is to keep individuals from forgetting about the group's goals before they are accomplished. Without a written plan the group is likely to chase the latest fad or idea-of-the-day until they are exhausted and frustrated. Without a plan which reflects the desires and interests of its members, a group may see its members lose interest and drop out.

Many organizations write a calendar of activities which is simply a simplified outline of the activities in their plan of work (see module E-11). See module M-2 to help you implement the plan you have written. Remember to evaluate your plan of work (see module E-10) and use the evaluation results to get started on next year's plan of work.

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Program Evaluation E-10

If you want life to be easy, you must pay for it.

This is the last step in the program planning process. Yes, evaluation should be considered during the planning process. It should not wait until the program has been completed.

In order to understand evaluation's place in the program planning process you will need to review module E-4. In order to plan an evaluation correctly it should follow the other steps in program planning (described in modules E-5 through E-9 and M-2).

LEARNING OBJECTIVES

When you finish this module you should be able to:

1. Define "evaluation."
2. Plan for the evaluation of some aspect of your group's educational program.

EVALUATION DEFINED

Evaluation is simply "a process to determine if objectives have been met." Well written objectives are essential to planning an evaluation. When planning an evaluation, start by reviewing the objectives. If you lack a set of clear, appropriate objectives, you will find it difficult to get agreement on any plan for evaluation.

LEVELS OF EVALUATION

Dr. Claude Bennett, Evaluation Specialist, Extension Service, U.S. Department of Agriculture, has outlined seven levels of evaluation which will help us understand the benefits and limitations of particular evaluation techniques and instruments.

1. Resources How many dollars, how many handouts and exhibits, what resource people, what materials did we use in the educational program that we are evaluating?

2. Activities How many planning meetings, demonstrations, workshops, field trips, contests, telephone calls, newspaper articles did we complete?

3. Participants Who participated in the activities that we organized? What were their ages, ethnic backgrounds, gender, socio-economic status, area of residence, organizations represented (and how many of each category)?

4. Reactions Did the participants like the activities? What comments or suggestions did they make regarding the activities?

5. Changes in Knowledge, Attitudes, Skills and Aspirations (KASA) As a result of your program's activities how did the participants improve (or regress) in KASA? Was there really any difference in the participants as a result of the program?

6. Adoption of New Practices Did the participants retain the KASA changes over time? Were these changes of short duration or did they become part of the participants' lifestyles?

7. End Results What were the long term effects of your program on the local community or society in general? Did the number of teen pregnancies decrease? Did the production of wheat (bushels per acre) increase? Were new organizations created? Was the lifestyle of community members improved? Can the improvements be attributed to the educational program that you provided?

These levels of evaluation represent an increasing time requirement and increasing difficulty for the evaluator. They also represent an increasing value of evaluation results. Determining resources, activities and participants is relatively easy--it can be done by observation and counting. To determine reactions you will need an organized technique (a trained observer/recorder or a post-meeting questionnaire). To determine changes in KASA and adoption of new practices you will need to gather evidence before and after the program in a reliable and valid procedure. End results take time and great sophistication of measurement by evaluators.

On the other hand, if you can gather evidence about changes in KASA or adoption of new practices, you will have stronger evidence for continuing your program or for getting funding for similar programs.

EVALUATION ALTERNATIVES

To most of us, evaluation means completing an evaluation form at the end of a meeting or training program. Other, often more useful, forms of evaluation are described below.

Round Robin

The round robin evaluation simply involves calling on each person in turn to share reactions to a given activity. For example, "What was your evaluation of last week's meeting (4-H horse show, training session)? What did you particularly like, and where might improvements be made?" Appoint a secretary to record responses. An important ground rule is no discussion, except for questions of clarification. This keeps the group from getting bogged down in defending, disputing and discussing individual comments until everyone has been heard. The round robin insures input from everyone, without debate. Once everyone has been called upon, the composite listing can then be discussed, if necessary, and conclusions drawn.

One of the most commonly used forms of evaluation is a call for public input. The chair (or other official) poses a general question to the group as a whole, e.g., "Any comments on last week's horse show?" Experience shows that only a few people respond to such calls for input. The round robin, in contrast, will insure greater input and involvement. If members find that their input is respected and used, they will be more willing to speak openly in the future, and the quality of evaluation will increase.

Buzz Groups

Buzz groups, often called Process Groups, involve quickly breaking into small groups of two to five people. Each buzz group is to assess the meeting (workshop, etc.). Each person is asked to share his frustrations, concerns, suggestions and satisfaction with how things are going. Where there is consensus, the buzz group should initiate action to improve the meeting or workshop, e.g., propose to the group that..., or talk to the chair about..., or suggest....

Set a time limit of 15 to 30 minutes for this exercise. One option is to incorporate the process group assignment into an extended break. The advantage of this exercise is that people tend to share more openly in smaller more private groups than they do in larger public groups. Also the focus of the exercise is on action rather than complaints. Periodic process breaks are invaluable in developing a cohesive team spirit along with an added sense of personal responsibility.

Observer

Arrange for one or two individuals to serve as a process observer. They will not enter into the discussion but instead sit back and observe how the meeting is progressing, (i.e., what are the group dynamics, who is and isn't talking, how are decisions made, what team building roles were exhibited). The observer is to identify strengths as well as weaknesses. The checklist provided earlier in this chapter can serve to guide the observer in analyzing a group.

The observers are then called upon at the end of the meeting to share their observations and suggestions with the group, and to pinpoint team building skills the group could work on. The advantage of designated observers is that they are removed from the operation of the group and can be more systematic and objective in their assessment. It is difficult for individuals who are directly involved in a meeting to step back and critique what is happening.

Review Goals

Every organization should plan time at least quarterly to review its goals and objectives. What has been accomplished? What has not? What adjustments (additions or deletions) need to be made? How do individuals in the group feel about the group's accomplishments? How well is the group (or designated committees) working together to accomplish those goals? Do these goals still reflect the priority interests of group members? What are the group's short-comings?

Such evaluation has the advantage of focusing the group's attention on accomplishments. Changes in the group's goals, committee organization, or how meetings are conducted can be made now rather than put off until next year.

One-on-One Consultation

One of the most useful forms of evaluation is face-to-face consultation. Good managers are in frequent contact with workers (group members). They seek feedback and advice. Most people are reluctant to give advice unless it is asked for. To get useful feedback, ask specific questions.

Quickly get any areas of potential awkwardness out in the open, i.e., "I heard you were upset with me about. . .Let's talk about that first." Be an active listener. Don't respond defensively.

In giving feedback that has not been requested, one-on-one communication also works best. No one likes to be criticized in public. (Review module V-6, for guidelines in giving constructive

criticism.)

<u>Written Evaluation Survey</u>

The traditional evaluation form asks participants to rate the meeting (workshop or event) according to certain listed criteria. Several open ended questions should also be included for a more detailed and personal response, e.g., "Where might improvements be made?" Two examples of survey evaluations forms are attached ("End of Meeting Suggestion Slip" and "Workshop Evaluation," pages 10-11). Such surveys have the advantage of being anonymous. Also, the results lend themselves to statistical analysis. Take care in preparing the evaluation form to insure that the questions asked are easily understood and that they provide information that can be used.

WRITTEN EVALUATION INSTRUMENTS

A. End of Meeting Suggestion Slip

1. Please rate today's meeting on the basis of the following criteria.

	Low					High	
a. Participation	1	2	3	4	5	6	7
b. Productivity	1	2	3	4	5	6	7
c. Team Building	1	2	3	4	5	6	7
d. Chair Effectiveness	1	2	3	4	5	6	7
e. Consensus Building	1	2	3	4	5	6	7
f. Interest & Cooperation	1	2	3	4	5	6	7

2. What were the strong points of this meeting?

3. What were the weak points?

4. What improvement would you suggest?

(You need not sign your name.)

* * * * * * * * * * * * * * * * * * *

B. Workshop Evaluation

Title of workshop: _____

1. How would you rate this workshop on each of the following items?

Please circle appropriate number:

	Poor					Excellent	
a. How interesting did you find the workshop?	1	2	3	4	5	6	7
b. How useful was the information provided?	1	2	3	4	5	6	7
c. How did you like the way the workshop was conducted?	1	2	3	4	5	6	7
d. Was there discussion among the participants?	1	2	3	4	5	6	7
e. How were the room arrangements?	1	2	3	4	5	6	7
f. Overall rating for workshop content.	1	2	3	4	5	6	7
g. Overall rating for workshop presenter.	1	2	3	4	5	6	7

2. Specifically how has this workshop helped you?

3. In what areas would you like further information or help?

C. Module _____ Evaluation

1. How long did it take you to read this module and complete the prescribed exercises? (Check one)

_____ less than 30 minutes

_____ 30-60 minutes

_____ more than 60 minutes

2. How helpful was the information provided in meeting your leadership needs?

(Circle one of the seven numbers on the following continuum.)

1	2	3	4	5	6	7
Of Limited Value			Helpful		Very Helpful	

3. Was the module well written and easy to follow?

(Circle one of the seven numbers on the following continuum.)

1	2	3	4	5	6	7
Hard to Read			Readable		Easy to Read	

4. I found this module (Check one or more)

_____ too elementary for my needs.

_____ too advanced for my needs.

_____ overly academic.

_____ very practical.

_____ well matched to my needs and leadership experience.

_____ provided little I didn't already know.

_____ stimulated my thinking.

_____ provided me with lots of good information.

_____ difficult to put into practice

_____ _____

5. Specifically the information in this module has helped me by .....

6. How could this chapter be improved?

7. Considering the content of this module and comparing my knowledge and confidence before and after I completed this module

1	2	3	4	5	6	7
I feel no more knowledgeable and confident.		I feel somewhat more knowledgeable and confident.			I feel much more knowledgeable and confident.	

D. Overall Program Evaluation

Getting Results: A Guide to Effective Leadership

1. How did you undertake this program? (Check one)

_____ independent self-study

_____ as part of a study group

2. Did you find the program motivating?

(Circle one of the four numbers on the following continuum.)

1	2	3	4	5	6	7
I had a hard time motivating myself to complete the program.		I was motivated to keep at it.			I couldn't put it down; I looked forward to each chapter.	

3. How many weeks did you dedicate to this program?

4. Which of the modules did you find most beneficial?

5. a. During the past five years, in what other leader training programs have you participated? (List them in the space below.)

b. How would you rank this program in comparison to those?

6. How have you used the information you've gained through this program?

7. In what areas would you like further information or help?

8. Would you recommend this program to others?

_____ Yes

_____ No

E. Evaluation of Classroom Teacher

EXERCISE:

Use (or adapt) one of the evaluation instruments to your group or organization. Discuss the findings and the success of your evaluation with a partner who is also interested in evaluation.

EXERCISE:

Start a notebook (or a file) of evaluation instruments. Ask different groups, organizations, agencies, etc. for copies of evaluations that they use, especially of of educational programs for community groups.

A Toolkit for Volunteer Leaders
Educational Design

Calendar of Activities E-11

A walking ant accomplishes more than a sleeping bull.

This module follows module E-9, writing a plan. If you have not completed that module, do so now.

EDUCATIONAL OBJECTIVE

After you finish this module you should be able:

1. To develop a calendar of activities.

DISTRIBUTE ACTIVITIES OVER THE CALENDAR YEAR

You need to make sure that the activities planned are evenly spread over the year. Put the major activities together on a "calendar of activities worksheet" (next page). Each of these major activities may involve several events, meetings and responsibilities. These are all noted on the planning worksheet (see module E-9) so they need not be written in detail on the calendar of activities. (See the example Calendar of Activities after the next page.)

The calendar of activities has uses beyond organizing the plan. It can be used for publicity, to recruit new members, to seek contributions and to coordinate with other organizations. It should also be distributed to all members so they can keep track of upcoming activities.

You may wish to assemble and edit all of the planning worksheets (completed as a part of module E-9) to distribute to the members. Whether you do this or not, you will need to get commitment from each person who is responsible for an activity on the planning worksheets. Get that person to initial the planning worksheet to signify agreement and commitment.

EXERCISE

Use the worksheet on the next page to write down a calendar of activities. If you have difficulty you may want to refer to the example calendar of activities on the following page. You may do this exercise alone. If you are working with an organization, however, you will need to consult with as many of the officers and members as possible in developing a calendar of activities.

CALENDAR OF ACTIVITIES WORKSHEET

Priorities this year:

1.

2.

3.

September

October

November

December

January

February

March

April

May

June

July

August

CALENDAR OF ACTIVITIES
Example

Priorities this year:

1. Recruit 25 new members.

2. Raise $2,000 for charity.

3. Sponsor a community leadership training course.

September -

- Officer installation ceremony.
- Discuss ideas for membership drive.
- Pass out annual plan of work.

October -

- Appoint membership drive committee.
- Discuss fundraisers.

November -

- Membership drive committee makes assignments for publicity and contacts.
- Appoint committees for fundraisers.

December -

- Publicity goes out for membership drive.
- Assist schools with annual Christmas safety program.

January -

- Membership blitz. Sign up 25 members.
- Review current plan of work.

February -

- Assignments for first fundraiser.
- Discuss leadership training course.

March -

- First fundraiser nets $1,000.
- Assignments for second fundraiser.
- Plan for leadership training seminars.

April -

- Assist with annual antique show.
- Contact community groups to participate in leadership training.

May -

- Second fundraiser nets $1,000.
- Annual recognition night.
- Discuss priorities for next year's plan of work.
- Call for nominations for officers for the coming year.

June -

- Weekly leadership training seminars.
- Summer picnic with families.
- Complete plan of work for next year.
- Close nominations for officers.
- Announce the slate of candidates for elections.

July -

- Election of officers for new year.
- Weekly leadership training seminars.
- Annual evaluation and report.

August -

- Vacations - no activities.

NEXT STEPS

Module M-8 discusses how to develop a budget from a plan of activities. Module M-2 will describe how to implement a plan after you have completed the planning process. Module E-10 discusses evaluation of programs.

A Toolkit for Volunteer Leaders
Educational Design

Curriculum Development E-12

Curriculum is usually understood as an organized program of educational offerings. Ornstein & Hunkins (1988) define curriculum as "a plan for action, or a written document, which includes strategies for achieving desired goals or ends."

Before attempting this module you may wish to review the discussion of nonformal education in modules E-1 and E-3.

LEARNING OBJECTIVES

By studying this module you should

1. Understand how curricula are developed for Pennsylvania 4-H.

2. Develop a plan for curriculum development for a particular audience in nonformal education.

CURRICULUM DEVELOPMENT FOR PENNSYLVANIA 4-H

In Pennsylvania curriculum development for the 4-H youth development program is the process whereby curriculum is planned and organized to meet 4-H program objectives. A 4-H curriculum includes written materials (project guides, leaders guides, supplementary bulletins, etc.) as well as the activities (meetings, workshops, competitions, community service, etc.) needed to meet specific project objectives as well as the 4-H program objectives (including positive impact on youth and society). Attached is a diagram which depicts this curriculum development process. This diagram describes how curriculum has been successfully developed in the past as well as how it should be developed in the future. There is nothing strikingly new or innovative about this diagram but it does include all of the steps in a written sequence.

This diagram describes a model which can be used in at least three different settings: 1) for a committee composed of state 4-H specialists, state subject matter specialists, county 4-H agents, and volunteers, to plan and write a new curriculum at the state level; 2) for a committee representing county 4-H agents and project leaders to plan and write a new curriculum for a special need at the county level; and 3) for any 4-H professional to adapt and rewrite a curriculum based on a project in another state.

The process starts with needs assessment. County agents may call on colleagues who have successfully completed a county needs assessment as well as state specialists for help in planning their respective county needs assessments.

Based on the needs of 4-H clients, the curriculum developer must choose the program area where the developed curriculum would fit. Those areas include: animal science, plant science, mechanical science, natural resources, careers, citizenship, leisure and cultural education, family living, communications, leadership and "other." Specialists will need to be contacted and written materials reviewed to determine what exists (or what existed before) that is related to the proposed curriculum. The key questions at this point are "where will this new curriculum fit" and "how will the organization support it?"

Next, specific project materials and supporting activities are reviewed. Gaps, problems and opportunities must be identified if the new curriculum is to be relevant, complete, and not in conflict with existing curricula. Resources (people, time, money, materials) needed for proposed activities should also be considered. Sources of information for writing the new curriculum should be thoroughly reviewed. Information should be organized in outline form according to an approved format to insure consistency and completeness. This format will vary according to the delivery system. Activities needed to support the information should be outlined. Each activity will have its own agenda (schedule of events).

Now the outlines can be "fleshed out" with attention given to the reading level of the intended audience and to the ten life skill areas. Written materials should be reviewed and edited by someone different than the author. The agenda for each activity should be developed in detail, then criticized and refined. At this point the activities and written materials can be piloted with a small target audience. If necessary, materials and activities can be revised after the pilots to eliminate problems in implementation.

The written materials are than disseminated and supporting activities implemented. Formative evaluation in the early stages of implementation will be critical. Following the initial stages, periodic evaluation may be formative or summative as decisions are made to continue, revise, or abandon the curriculum. Major revision of the curriculum may be desirable at some point. Then the entire curriculum development process can be initiated again beginning with needs assessment. Part of that needs assessment would be the summative evaluation of the old curriculum.

SUPPORTING DOCUMENTS

Pennsylvania 4-H uses three supporting documents in curriculum development. These are the state 4-H objectives, a list of life skills of youth identified through research by 4-H specialists, and a two-page summary of curriculum design elements important to 4-H curriculum.

These design elements include:

1. action -- make certain youth are not treated as passive learners, build in fun, build on their interests, let them see that they are making progress;

2. interaction -- provide ample opportunities for youth to interact with people, ideas and things;

3. decision making -- teach and use the decision making process increasing youth's experience in making decisions;

4. recognition -- reinforce learning by a wide variety of informal as well as formal types of recognition for accomplishment, participation and teamwork;

5. public affirmation -- provide opportunities for youth to publicly share what they have learned by speaking, exhibiting, performing, etc.

6. leadership (helpership) -- provide a variety of opportunities for youth to help teach others by giving them responsibility, guidance and support;

7. flexibility -- provide a variety of learning opportunities on various topics in different settings with a minimum of unnecessary rigidity which restricts participation;

8. utilization of resources -- help youth to recognize and use such resources as themselves, other people, things, family activities, etc.

QUESTIONS FOR DISCUSSION

1. Does your organization provide education for clients or members?

2. Is it formal or nonformal education?

3. What is the curriculum (written materials **AND** activities)?

4. Where is the curriculum weakest?

5. What new curriculum do you need? Can you get it elsewhere or should you develop it internally? Who should be involved?

EXERCISE:

Find a piece of written curriculum that your group uses for educational purposes. Follow the curriculum development process described above to revise and strengthen the curriculum. Review your organization's mission, goals and objectives at the beginning of your revisions. Ask yourself if there are specific curriculum design elements that should be included.

EXERCISE:

Plan a new curriculum piece to meet educational needs that are unmet so far. You may do this for your own organization or work with representatives of another organization who need a new curriculum for an emerging educational need. Start by reviewing this module. Then outline a plan for involving other key people in the process. Write a least a page outline that tells who does what by when in order to produce a draft of the new curriculum with its written materials and supporting activities. Share your draft with a colleague for critique and feedback.

Mission Statement E-13

If you don't know where you're going, you're bound to end up someplace else.
(attributed to Casey Stengel, former baseball manager)

Many groups lack a clear sense of direction. Each member has different ideas as to what the group should accomplish. These individual perceptions often differ, leading to misunderstanding and conflict. In this module you will learn to involve group members in a process which will not only clarify group purpose but also inspire and motivate membership. Then you can develop an organizational structure that gets results.

LEARNING OBJECTIVES

1. Write (or revise) a "mission statement."

2. Develop a unified sense of direction for your group or organization

WHAT IS YOUR MISSION?

A group with a clear mission and a set of goals and objectives which are mutually accepted by its membership has an achieving force that is almost irresistible. People are motivated through ideas, programs and results--not merely by being members. A clear statement of the mission and goals of a group provides the basis on which people can judge the merits of that group relative to their own needs and interests.

Group identity doesn't just happen. It is developed. New members may identify with an organization merely because they have joined. That reason, however, will last only for a few weeks or months. New members' initial enthusiasm will quickly dissipate if the organization fails to address their individual concerns. The same thing can happen to older members.

CLARIFYING YOUR MISSION

A mission is a general statement of a group's ideals and purpose. A mission statement tells what the group represents and what general issues it addresses. A mission statement explains the group to outsiders as well as providing focus for its members. Many groups are associated with a state or national organization which has a formal statement of mission, along with organizational guidelines. Such groups should periodically review that mission and clarify its meaning. The local group should be encouraged to expand on that mission statement, putting it into its own words and, therefore, establishing its unique identity. It is important that the mission statement be developed and internalized by group members, rather than imposed upon them. Otherwise, there is limited ownership. A group with no outside affiliation is in the fortunate position of being able to develop its own mission, tailored to its unique situation and needs.

EXERCISE:

Set aside time at a regular or special meeting to develop/review your mission statement. Call on each member in turn to express what s/he feels should be the purpose and ideals of the organization. Record these on newsprint or a chalkboard for all to see. Once everyone has been called upon, review the list. Ask for comments. "Is this an ideal to which we all wish to commit ourselves?" If there are objections, modify the statement to meet the group's approval. Ask for suggestions as to how the wording of the statements might be improved. After a period of discussion, form a committee to combine and condense the listed statements into a mission statement, to be presented at the next meeting. Time is taken at that meeting to discuss and revise the condensed statement until consensus is reached. This consensus building process may require several meetings, with the committee incorporating suggestions into the statement for the group's review.

The more that individual members are directly involved in developing and revising the mission statement the more meaning it will have to them. Otherwise, the exercise becomes one of indoctrination with limited motivational impact.

IF YOUR GROUP LACKS ENTHUSIASM, IT MOST LIKELY IS DUE TO EITHER:

1. The lack of a clear understanding among members as to what the purpose and goals of the group are. In other words, you haven't done enough planning or goal setting.....or

2. The group's goals are not seen as personally important to many of the members. In other words, the members weren't really involved in the planning and goal setting.....or

3. Members fail to see how many of the group's activities really contribute to the agreed upon goals. In other words, your goals are not being followed.

You may wish to refer to other groups' mission statements as you write or revise yours. Three examples are offered below.

MISSION STATEMENT EXAMPLES

Country Living Fair Mission Statement

The overall mission of our organization is to provide awareness of alternatives for decision-making on family self-sufficiency. We will focus on information related to health and nutrition, energy, construction, food production and preservation, cottage industries, and use of leisure time. We encourage wide diversity of viewpoints and will not endorse any particular viewpoint. We will remain independent from control of any particular organization. We will operate on a non-profit basis. Our principal activity will be an annual educational fair.

Arizona 4-H Mission Statement.

1.   The Arizona 4-H Program is one of four educational programs of the University of Arizona Cooperative Extension Service. This program involving youth and adults is:

    a) nonformal and out-of-school

b) county oriented and locally determined

c) primarily group focused and family oriented

d) volunteer staffed and supervised by professional salaried faculty.

2. 4-H employs planned "learn by doing" experiences to enable youth to develop essential life skills, i.e.:

a) be socially, physically, and mentally healthy

b) explore and evaluate job, career and leisure time opportunities

c) acquire subject matter skills and knowledge reflecting current and new technologies

d) learn and practice leadership skills and fulfill leadership roles

e) participate in community and public affairs

f) understand and appreciate cultural similarities and differences.

3. 4-H is staffed by youth and adult volunteers under the supervision of professional salaried faculty:

a) The volunteers may do one or more of the following: teach, recruit, train, organize, provide support service, advise, counsel.

b) The professional salaried faculty uphold the principles of 4-H and the use of its emblem. They plan, recruit, supervise, enable and evaluate. They teach volunteers to use subject matter, educational methods, and the democratic process to achieve program objectives.

4. 4-H is publicly supported by county, state and federal governments. Private resources, both human and material, are used to enrich the learning experience of youth and adults.

Cooperative Extension Service's

Community Resource Development Program

Our mission in this state is to provide educational assistance to communities for improving the physical, social, economic, and cultural environment. High priorities which we support include:

- development of educational programs which will assist leaders in their understanding and application of the community development process;
- assistance to individuals and groups in securing and using available resources;
- encouragement of citizen awareness and understanding of public issues;
- stimulation of effective organization at community, area, and state-wide levels and to provide guidance and educational assistance in the processes;
- the provision of educational programs for leaders which will expand their effectiveness in

making decisions that improve the quality of living in their communities; and
- the encouragement and involvement of citizens in the conservation of natural resources.

Typical programs that we offer include:

- local workshops in leadership skills;
- leadership training at the State level;
- organizing and maintaining volunteer programs;
- consultation on organizational development and on strengthening organizations.
- economic surveys to help communities to strengthen local business or to attract new industries;
- assistance for small communities with community planning;
- consultation with groups on planning educational programs;
- public policy education on controversial issues;
- organizing self-sufficiency fairs;
- assembling resource guides to assist rural groups;
- providing assistance to towns and counties on improving public utilities;
- referring questions to other local, state or federal agencies;
- providing training for local boards or for local government; and
- assisting other Cooperative Extension agents with needs assessment, program planning, training, or evaluation.

Our overall goal is to increase the effectiveness of local groups and communities in solving their own problems and in achieving their own goals.

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Organizational Philosophy E-14

Whoever doesn't look ahead will always be behind.

Before you develop a "statement of philosophy" for your group or organization, you need to review module E-13 on developing a mission statement. A mission statement tells your purpose and general goals.

An organizational philosophy describes how you operate, what you offer and how you are organized to meet your goals.

LEARNING OBJECTIVE

This module will help you to revise or develop a statement of philosophy for your organization.

QUESTIONS FOR DISCUSSIONS

1. Does your organization have a mission statement?

> If the answer is yes, is it up to date...does it still describe your organization to its stakeholders (groups of individuals who are affected by the organization's success or failure)?

> If the answer is no, does it need a mission statement?

2. Who are your stakeholders? What are their concerns? What do you wish them to know about your organization?

EXERCISE:

Review the mission statements of some organizations that you know. Include the example below. Review the exercise for developing a mission statement (module E-13) and adapt that process to your group to develop (or revise) your organizational philosophy.

AN EXAMPLE OF ORGANIZATIONAL PHILOSOPHY

Pennsylvania 4-H has printed their philosophy statement on a four-fold, multi-color flyer. On the front panel is a large 4-H clover. Then the statement, "Take a look at us now!" At the bottom is the full identification of the organization, "Youth develop programs, Cooperative Extension Service, The Pennsylvania State University.

Inside the flyer are four panels devoted to a short explanation of the four H's. Another panel lists the projects offered through 4-H and a paragraph which touches on important philosophical elements (youth learn by doing; they prepare themselves for the future; they learn in groups of youth; they have fun; they meet in their local community; they are taught by professional agents and adult volunteers; they participate in fairs, trips, tours, and camps; they host international youth visitors; they can choose the projects for which they have an interest).

Three panels of the flyer give short answers to the following questions: how does one become a member of 4-H; how much does it cost; if we live in the city can our youngster join; what ages are included; what activities will my youngster do in the local club; am I required to be a leader; can I be a leader if I have no children; do I need to be an expert to lead a project; will my youngster be safe at all times; who sponsors this program? The last panel is a list of the county offices and their phone numbers so parents can contact their local 4-H agent.

NEXT STEPS

When you have a philosophy statement that is supported by your organization you will need to print it and be sure that every member of the organization has a copy. You may want to have it printed in an attractive format (such as a multi-color flyer) to be used for publicity and recruitment.

An organizational philosophy, along with the mission statement, are valuable tools to use during the program planning process (see module

E-4). Use them during the priority setting part of program planning (see module E-6) when you are deciding on which needs of your members (or clients) your organization should address in the coming year.

PREPARATION

1. Were advance contacts made? Were pre-visits made where needed?
2. Were transportation arrangements satisfactory and cost effective?
3. Were the participants thoroughly oriented as to purpose, schedule, their responsibilities on the tour and necessary background information? Was a tour guide prepared?
4. Were plans confirmed in writing with hosts, resource people, and those responsible for logistics (transportation, meals, etc.)?
5. Was needed equipment secured?
6. Was the tour guide well prepared?
7. Was insurance in order.
8. Were liability issues considered? Arrangements made?
9. Was publicity appropriate?

IMPLEMENTATION

1. Did the participants know what to look for? Did they ask meaningful questions?
2. Were directions given on how to make useful observations? Did the participants make those observations?
3. Was the group well organized and supervised during the visits?
4. Was opportunity provided for active learning (i.e. practice)?
5. Did participants take notes for future reference?
6. Was group discussion led at appropriate times?
7. Were conclusions drawn from the discussion?
8. Were proper courtesy and appreciation shown toward the hosts and resource people?
9. Would another learning/teaching technique have be more effective instead of this tour?

FOLLOW-UP

1. Has a note of appreciation been sent to the hosts?
2. Were participants debriefed at the end of the tour or during a subsequent meeting to summarize observations and applications?
3. Were participants involved in evaluating the tour?