



National Library  
of Canada

Bibliothèque nationale  
du Canada

Canadian Theses Service

Service des thèses canadiennes

Ottawa, Canada  
K1A 0N4

## NOTICE

The quality of this microform is heavily dependent upon the quality of the original thesis submitted for microfilming. Every effort has been made to ensure the highest quality of reproduction possible.

If pages are missing, contact the university which granted the degree.

Some pages may have indistinct print especially if the original pages were typed with a poor typewriter ribbon or if the university sent us an inferior photocopy.

Previously copyrighted materials (journal articles, published tests, etc.) are not filmed.

Reproduction in full or in part of this microform is governed by the Canadian Copyright Act, R.S.C. 1970, c. C-30.

## AVIS

La qualité de cette microforme dépend grandement de la qualité de la thèse soumise au microfilmage. Nous avons tout fait pour assurer une qualité supérieure de reproduction.

S'il manque des pages, veuillez communiquer avec l'université qui a conféré le grade.

La qualité d'impression de certaines pages peut laisser à désirer, surtout si les pages originales ont été dactylographiées à l'aide d'un ruban usé ou si l'université nous a fait parvenir une photocopie de qualité inférieure.

Les documents qui font déjà l'objet d'un droit d'auteur (articles de revue, tests publiés, etc.) ne sont pas microfilmés.

La reproduction, même partielle, de cette microforme est soumise à la Loi canadienne sur le droit d'auteur, SRC 1970, c. C-30.

THE UNIVERSITY OF ALBERTA

FORMATIVE EVALUATION  
OF A  
NATIVE TRAINING OF TRAINERS PROGRAM

BY  
MURRAY SILLITO

A THESIS  
SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND  
RESEARCH IN PARTIAL FULFILMENT OF THE REQUIREMENTS  
FOR THE DEGREE OF: MASTER OF EDUCATION

IN  
ADULT AND HIGHER EDUCATION

EDMONTON, ALBERTA

FALL, 1988

Permission has been granted to the National Library of Canada to microfilm this thesis and to lend or sell copies of the film.

The author (copyright owner) has reserved other publication rights, and neither the thesis nor extensive extracts from it may be printed or otherwise reproduced without his/her written permission.

L'autorisation a été accordée à la Bibliothèque nationale du Canada de microfilmer cette thèse et de prêter ou de vendre des exemplaires du film.

L'auteur (titulaire du droit d'auteur) se réserve les autres droits de publication; ni la thèse ni de longs extraits de celle-ci ne doivent être imprimés ou autrement reproduits sans son autorisation écrite.

ISBN 0-315-45516-0

THE UNIVERSITY OF ALBERTA

RELEASE FORM

NAME OF AUTHOR: Murray Sillito

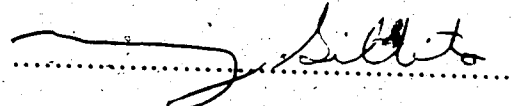
TITLE OF THESIS: Formative Evaluation of a Native Training of Trainers Program

DEGREE: Master of Education

YEAR THIS DEGREE GRANTED: 1988

Permission is hereby granted to THE UNIVERSITY OF ALBERTA LIBRARY to reproduce single copies of this thesis and to lend or sell such copies for private, scholarly or scientific research purposes only.

The author reserves other publication rights, and neither the thesis nor extensive extracts from it may be printed or otherwise reproduced without the author's written permission.



PERMANENT ADDRESS:

Murray R. Sillito

12 Butterfield Crescent

St. Albert, Alberta

T8N 2W7

Date: Sept 23/88



THE UNIVERSITY OF ALBERTA  
FACULTY OF GRADUATE STUDIES AND RESEARCH

The undersigned certify that they have read, and recommend to the faculty of  
Graduate Studies and Research for acceptance, a thesis entitled .....  
*Formative Evaluation of a Native Training*  
*of Native Trainers Program*  
submitted by ..... *Murray R. Sillito* .....  
in partial fulfillment of the requirements for the degree of *Master of Education*  
in ..... *Adult and Higher Education* .....

.....  
(Supervisor)

*K. L. Ward*  
*A. K. Deane*

Date: *Sept. 28, 1988*

## ABSTRACT

The purpose of this study was to conduct and report the results of a formative evaluation of the first year of a three-year pilot project to design, develop, and deliver a Native training of trainers program. This program, developed by Nechi Institute, was to be a model program, national in scope.

A proposal to conduct the evaluation was written and submitted by the author at the request of Nechi Institute, a nationally recognized Native training organization. The evaluation proposal was then used as the framework upon which to conduct the study although a number of significant changes were made from what was proposed to what was actually done. These changes in conduct and focus from the original proposal were made as necessitated by the evolving nature of the project.

The intent of the author was that the results of this study would provide information to Nechi Institute for their continuing development of the program and also provide information into the process of conducting evaluations of adult Native training programs.

Some of this information focuses upon the effect and impact of Native culture on the evaluation process, the importance of the role and relationship of an evaluator in this type of setting as well as a variety of observations and comments dealing with evaluation in general. The nature and use of formative evaluation in this context is also explored and reported as were issues of data collection in a culturally-based Native program. Other findings include information on the needs of adult Natives attending the training program and the resultant areas of growth (affective/spiritual, social, cognitive and professional) and their importance to Native people. The information was derived using a grounded-theory approach where the experience of conducting the evaluation is reviewed and reflected on and then referenced to the literature.

Contained in the appendices are copies of the evaluation proposal, the development proposal, and the contract with the funder, all of which may be helpful to others interested in this type of program.

## ACKNOWLEDGEMENTS

The author wishes to express gratitude to a number of individuals without whose assistance this thesis would not have been possible. Thanks to Nechi Institute for the opportunity to be involved in the project and to all NTD staff - Maggie, Dale, Butch, Wendy, and Brenda - for their kindness and insights. Thanks also to the trainees who attended the training program for their significant sharing of information and feelings, especially in relation to the culture and traditions of Native people.

A special thanks to Dr. D. A. MacKay who supported and encouraged the author in his desire to conduct this study and for his assistance in helping to facilitate the dual purposes of this document. Appreciation is expressed to Dr. K. L. Ward and to Professor Art Deane for their willingness to serve on the thesis committee.

The author is indebted to Jolayne Call and Valerie Armstrong for their valuable editorial input. Gratitude is extended to my colleagues at Sage Analytics for their support in terms of time allowed to write this thesis and for their sincere support and encouragement through the months it took to complete it.

To my Father, Dr. M. T. Sillito whose example and advice has always been exemplary and without which I would probably not have attempted graduate school. And finally to my wife Lori and our children who unhesitatingly supported me by carrying the majority of the workload for many weeks, my love and appreciation.

## Table of Contents

CHAPTER	PAGE
1. Project Overview	1
Introduction	1
Overview	3
Background and Scope of the project	4
Structure of This Report	8
2. Project Management: Observations and Conclusions	10
Contract	11
Problems in the Initial Contract	11
Innovations Officer's Perspective	15
Review of Revised Contract	16
Planning Concerns, Organizational Details	16
Placement/Follow-up	19
Recruitment and Selection of Trainees	21
Staffing	23
Staff Roles	23
Use of Staff	24
Staff Needs	25
Establishing a Network	26
3. Trainee Experiences: Observations and Conclusions	28
Areas of Growth	28
Cognitive	32
Personal (Affective and Spiritual)	34
Social, Networking	38

Professional	39
Obstacles to Growth	40
4. Training Program: Observations and Conclusions	43
Assessment	43
Program Design	44
Training Program Content	46
Scheduling, Sequencing	47
Materials and Resources	48
New Training Program Directions	49
Trainee Assessment and Feedback	50
Testing	50
Practicum Evaluation	52
Purpose	52
Conducting the Evaluation	52
Planning/Implementation	54
Instruments	56
Stakeholders	57
Scheduling	57
Graduation	58
5. Training: Observations and Conclusions	59
Facilities/Materials/Resources,	60
Preparation for Training	60
Presentation/Delivery	61
Instructions/Terminology	63
Discipline/Control	64
Relationships/Roles	66

6. Project Summary	69
Project Strengths	69
Changes Made	70
Future Directions	71
Conclusion	73
7. Evaluating This Project: Observations and Reflections	75
Background and Scope of the Evaluation	75
Evaluation: Proposal/Actual	77
Basic Aims	78
Evaluation Design	79
Data Collection	80
Cultural Acclimatization	81
Data Analysis	82
Evaluation Process	83
Evaluation Tasks	84
Reporting	85
Contract	85
Payment Schedule	86
Role of the Evaluator	87
Evaluation Review and Planning for Next year	90
Conclusion	92
References	93
Appendix A Native Trainers Development Project Proposal	97
Appendix B Contract	117
Appendix C Evaluation Proposal	120

## LIST OF FIGURES

Figure	Page
1. NTD Staff Chart	10
2. Age Distribution of Female Trainees	29
3. Age Distribution of Male Trainees	29
4. Distribution of Trainees by Province	29



## Chapter 1

### INTRODUCTION AND PROJECT OVERVIEW

#### INTRODUCTION

The intent of the author is that this document serve two purposes. First, as a report to Nechi Institute of the formative evaluation of their Native Trainers Development Project (NTD) and secondly, as a thesis for my Masters Program in Adult Education at the University of Alberta. This document was designed and written to accommodate both purposes concomitantly. One of my goals for this study was to observe and experience a Native adult training program by evaluating the program. The culmination of the effort toward achieving this goal is this document.

The study requested by Nechi Institute, a nationally recognized Native training organization, called for a formative evaluation of a three-year pilot project to develop a model Native "training of trainers" program. The project was appealing to me because of previous experience in conducting evaluations and personal interest in Native education programs and, in particular, their culture and traditions and their interaction within an education program. The study consisted of a proposal (containing the design and methodology) to conduct an evaluation of a Native training of trainers program, the actual conduct of the evaluation, and the reporting of the results of the evaluation as well as a reflective review of the whole process of evaluating Native programs.

The reporting of the results of this study is done in a unique manner. Rather than following a more traditional method of writing the results for a thesis study, the author chose to focus the report on two areas. First, the findings of the evaluation study are reported in Chapters two through six. These chapters are of particular interest to Nechi as a

source of information in the continuing development of their three-year pilot project. For other readers of this thesis some of the information contained herein may also prove to be of use. Included in the appendices are copies of the funding proposal submitted by Nechi Institute to Employment and Immigration Canada, the contract subsequently entered into by both parties, and the evaluation proposal submitted by the author. These copies may provide substantive information (as may the findings of the study) for individuals interested in not only the development of Native training programs but in the development of proposals for funding and the types of contractual obligations this may entail.

The final Chapter presents the types of information that would traditionally be found in chapters dealing with issues such as design, methodology, and the related literature search. However, this information is presented in a different format from a substantively different approach - a grounded-theory approach. This is in keeping with an important element of adult education programs, that of experiential learning. A grounded-theory approach allows first for the experiential component followed by a review and reflection on related theoretical aspects. This approach involved the development of a proposal to conduct the study followed by the actual conduct of the evaluation (with a number of significant differences from that which was proposed). During and after this process was completed, a reflective review of the whole issue of evaluation was undertaken, including issues concerning the effect of Native culture in the program. This information was then compared and contrasted with the literature. This approach offered some unique insights into Native culture and evaluation, and their interaction within an educational program. In retrospect, there is no way the author could have learned or adequately described Native programs or the unique aspects of evaluating same without the experience of conducting the evaluation. The review of the literature (some of which was already known to the author) after the experience of evaluation was especially meaningful.

This study was important for the author because it provided first hand experience in conducting evaluation in an area outside of his realm of experience. It facilitated the

exploration of a number of significant variables such as the interaction of Native culture in adult education programs and the influence that this had on the whole process of evaluation. There is very little written in the literature dealing with evaluation in the context of a culturally based Native training program for adults. The whole educational milieu of Native programs is significantly different from non-Native programs and was most interesting to the author. This seems to be an area of neglect in the study of adult education even at a graduate level program at university although it fits into the broad category of Adult Education.

This document presents the experiences and observations of the author. In the final analysis their utility will be measured by those who use the information from this study for their own varied purposes. Already, the information has been helpful to Nechi Institute in the ongoing development of their project.

### Overview

... Indian people in Canada are experiencing a reawakening. They have come of age. Indian people are saying that we are not satisfied with someone else shaping our future and running our affairs. Instead we want a future that will take into account our spirituality and our traditional forms of government, that will allow us to live the kind of lives we desire.

Del Riley

With the inception of the Native Trainers Development Project by Nechi Institute, this reawakening and desire for shaping of their own future, by Native people, has taken another important step forward. This vision and challenge for Indian people has been accepted by Nechi Institute and NTD staff. Their dedication to those larger goals and to the

NTD project itself is clearly evidenced by the significant amount of time and effort they have spent beyond the required time commitments. Trainees attending this "training of trainers" program reflect the same desires expressed by Riley as evidenced by the great effort and sacrifice they put forth to attend the NTD program. The result of these efforts is a training program that is well on its way to successful completion, and a program that is already having an impact across the country.

My general impressions and overall estimation of the project are very favorable. However, as would be expected, much remains to be done in the next two years to complete the contractual obligations of this project. Those elements which need to be altered -- as determined by NTD staff -- should be altered insofar as they are within the financial and resource constraints of the project. Since this is a three-year pilot project, nearing the completion of its first year of operation, these observations and conclusions are written as a guide to next year's development of the NTD project. It is hoped that this report will "illuminate the situation" and not be used to "dictate the decision" (Ball, 1982, p. 172).

### **Background and Scope of the Native Trainers Development Project**

There is at present, "no systematic, continuous process for developing Native trainers (by a Native Organization or by Native professionals), despite the fact positions and opportunities for work exist" (see Appendix A, Native Trainers Development Project Proposal). Many people have supported this identified need for a culturally relevant training of trainers program, specifically targeted for Native people, one developed and delivered by a Native training organization. Fittingly, the NTD project was developed and proposed by Nechi Institute, a well known and respected Native training organization.

The NTD project was developed under the direction of Maggie Hodgson, Executive Director of the Nechi Institute. The driving force behind the project, Maggie, along with Mark Amy (who passed away in Napa Valley, California, May 27, 1987) and other Nechi

staff, were instrumental in nurturing the project to the point where it was approved and funded under the Innovations Program of Employment and Immigration Canada. The death of Mark Amy, who was to have been the project coordinator, meant finding a new coordinator to take charge of the project. This last minute change of project coordinators created a new set of circumstances which have influenced the eventual direction and outcome of the project.

For many years, the notion of a training of trainers program had occupied the time and efforts of Maggie and others at Nechi. The desire to provide culturally relevant training to Native people who would go back into their communities and organizations empowered with new skills, knowledge, and attitudes was intense. It was this hope and vision for a body of skilled professionals, working to enact change, which fuelled the necessary drives for the development and implementation of the program.

The dream for NTD was not for it to be just another program added to the list of programs already offered at Nechi. The vision was much larger, the task more important. The first step was to develop a top notch, culturally relevant, training of trainers program. Here was a chance to raise the level of competence among Native trainers in preparation for their employment as trainers in Native communities or in organizations dealing with Native communities or people. This employment could be in the form of newly created positions within organizations or expansion of existing responsibilities for individuals within an organization. The development of a list of potential employment positions would be used to help place the graduates from the NTD program in appropriate employment. NTD graduates would leave Nechi able to influence many others in their own communities and organizations by using the training skills developed in the NTD program. These Native trainers would extend the influence and impact which they personally experienced as a result of the NTD program to the many people they would encounter in their workshops.

The NTD project lists four goals and fifteen activities (see Appendix A, Native Trainers Development Project Proposal) that summarize the focus of the project and the tasks required for completion:

1. To develop and pilot test a model system of training Native people for professional roles as trainers.
2. To develop and pilot test a model system of recruitment, role identification, support and placement services to Native people in permanent training positions.
3. To place 45-50 Native Canadians in permanent professional training roles by January 1, 1990.
4. To involve a recognized independent Native training organization in providing critical, previously unaddressed, services which directly impact employment of potentially significant numbers of professional Native people.

In accomplishing these goals, the following activities were specified:

- a) To identify a preliminary inventory of 15-20 agencies, organizations, bands, firms and departments willing to sponsor specific training of trainers participants by 1987.
- b) To obtain specific sponsorship, including sponsor payment of travel expenses for 15 Native participants in the Nechi training of trainers program by 1987.
- c) To obtain specific sponsorship, including sponsor payment of travel expenses for 75 Native participants in the Nechi training of trainers program by March 31, 1987.
- d) To develop, test and modify as required training of trainers curriculum package appropriate to Native people.

- e) To have 15 Native professionals complete a 120-hour college or university accredited program of training of trainers by December 1987.
- f) To have 70-75 Native professionals complete a 120-hour college or university accredited program of training of trainers by December 1987.
- g) To significantly improve the training skills of 70-75 Native professionals in the following areas by March 31, 1990:
  - workshop facilitation
  - workshop planning and agenda design
  - application of learning theory
  - application of culturally appropriate learning strategies
  - group process
  - learning environment development
  - development and utilization of training materials and aids
  - learner intervention strategies
- h) To have identified 20-25 potential employment positions for qualified Native trainers by November 30, 1987.
- i) To have identified 75-80 potential employment positions for qualified Native trainers by March 31, 1988.
- j) To facilitate the placement of 4-6 qualified trainers from the Nechi program in employment positions by March 13, 1988.
- k) To produce a 35-40 minute video presentation on the subject of training Native trainers which could be marketed to a variety of purchasers or users.
- l) During the life of the project to field test and modify the support service program on at least three occasions.
- m) To complete a comprehensive process and outcome evaluation of training, placement and support services programs by March 31, 1990.

- n) To develop a financially self-sufficient program model for Native trainers employment service by March 31, 1988.
- o) To develop a financially self-sufficient program model for a Native training of trainers program by March 31, 1990.

The following is the timetable of activities and events as they occurred for the NTD project, year one.

<u>Activity</u>	<u>Time Frame July: 1987 - June, 1988</u>
Recruitment and Selection	July 15 - November 15
Curriculum Development	July 15 - April 23
Prepare Application for Certification	August - January
Workshops I	November 30 - December 12
II	January 12 - January 27
III	April 18 - April 23
Practicums I	February - April
II	April 23 - June
Graduation	June 24, 1988

### Structure of this Report

The primary purpose of this report is to provide information to NTD staff based on the first year's formative evaluation of the project, and secondarily, to fulfill the requirements of a thesis. This type of evaluation provided a "framework for observing the development or growth of (the) program toward specific goals", and it revealed "points of tension or program dysfunction that exist as the result of structural-organizational or human-emotional issues", and was used to "pinpoint discrepancies between program objectives and activities that are occurring" (Hayman and Napier, 1975, as quoted in Schneider, 1985, p. 4-5). It is not intended that this report be an extensive description of the project as a whole "as the investigator has more data than reasonably can be present in one report" (Knafl and



Howard, 1984, p. 21). Rather this report is a description of specific elements or themes of the project and the conclusions and recommendations that result (Bhola, 1982, p. 222).

The selection of the specific elements or themes evaluated was guided and directed primarily by the focus given to them in the course of the development of the NTD program. These themes (ie. management, trainee learnings, training program, training delivery - Chapters two through five) were then organized into related categories and placed into a framework within which the information gathered during the evaluation is reported in order of importance. A summary of the major project findings is presented in Chapter six. Chapter seven provides a reflective review of the evaluation process, from the initial contact with Nechi through the proposal and implementation stage to a final summary of pertinent observations regarding evaluation.

Overall, a lot of attention has been paid to small details, resulting in the identification of a seemingly large number of smaller issues. (It should be noted that the conclusion and recommendations here are not exclusively those of the evaluator, but include ones given by trainees and NTD staff and management. At the request of the project coordinator, a few of the specific recommendations, especially in the sections on training and training design, were excluded from this report.)

## Chapter 2

### PROJECT MANAGEMENT: OBSERVATIONS AND CONCLUSIONS

Early in the project, Maggie Hodgson, the Project Director, was faced with the necessity of replacing the Project's Coordinator, Mark Amy. Dale Flowers became the new Project Coordinator (responsible for the day to day operations) and has done a good job of picking up the project midstream and guiding it forward. Other personnel include Butch Wolfleg, Training Coordinator, Wendy Daignault, Placement Coordinator, and Brenda Longmore, Secretary. Two other trainers participated in the training workshops: Terry McCue and Jerry Endres.

The line chart of staff involved in the NTD project is displayed in Figure 1.

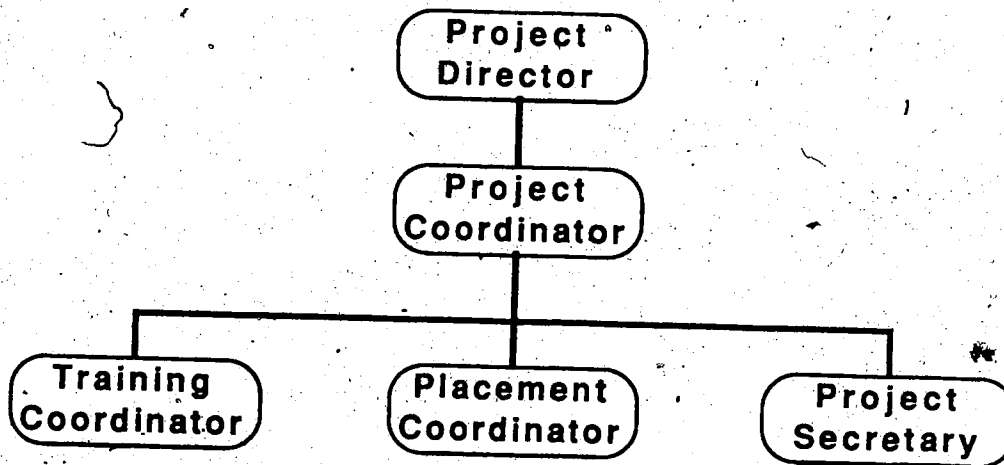


Figure 1 NTD Staff Chart

## Contract

### Problems in the Initial Contract

1. The contract between Nechi Institute and Employment and Immigration Canada contains some errors in dates and time lines, and confusion over the meaning of some of the items in the contract. These need to be carefully reviewed and corrected in conjunction with the representative from the Innovations Program of Employment and Immigration Canada. In a letter to the project coordinator dated October 18, 1987, the evaluator raised the following points in relation to the contract.

The wording of the contract (see Appendix B) between Nechi Institute and Employment and Immigration Canada raises some questions for discussion and consideration. Most of them will, it seems, require only minor alterations while others may warrant more attention.

1. Item 2) under Project Objectives

"develop and pilot test a model to recruit, identify roles, and provide support and placement services to place Native people in permanent training positions;"

The definition of permanent professional training roles would seem to be an important point for consideration. As one of the main objectives in this program, a workable definition based on the realities of the marketplace should be developed. For example, does "permanent" mean 1 month, 6 months, 1 year, or more? The funding agency may have their own definition of "permanent".

Will this coincide with the one developed by the NTD team? Similar concerns might be raised regarding the identification of "potential positions." It may be in everyone's best interest to tackle this issue early in the project.

2. Item c) under Proposed Activities

"To obtain specific sponsorship, including sponsor payment of travel expenses for 15 Native participants in the Nechi training of trainers program by March 31, 1987."

There will be a bit of a problem in trying to, "obtain specific sponsorship...by March 31, 1987" as the project did not start until July of 1987. Further, does this need to be done for all three years of the project in advance or would one year at a time be sufficient?

3. Item e) under Proposed Activities

"To have 15 Native professionals complete a 120-hour college or university accredited program of training of trainers by December, 1987."

The issue of "accreditation", by whom, what are the options (non-credit certification in lieu of accreditation), can it be done in time, and will it be acceptable to the funder, should be addressed soon.

4. Item f) under Proposed Activities

"To have 70-75 Native professionals complete a 120-hour college or university accredited program of training of trainers by December, 1987."

The date of "December 1987" should be changed to reflect the intended time (June, 1990) for the completion of a training program for "70-75 Native professionals." If only fifteen trainees are put through the program (as indicated in number 3 above) per year this will total only forty-five over the life of the project, not the seventy to seventy-five mentioned here.

5. Item g) under Proposed Activities

"To significantly improve the training skills of 70-75 Native professionals in the following areas by March 31, 1990:

- workshop facilitation
- workshop planning and agenda design

- application of learning theory
- application of culturally appropriate learning strategies
- group process
- learning environment development
- development and utilization of training materials and aids
- learner intervention strategies"

The term "significantly" implies some quantifiable measure. Is this Necessary?

How do you do this? Specific skills are also mentioned in this item. Are they being addressed in the development of the curriculum?

6. Item h) under Proposed Activities

"To have identified 20-25 potential employment positions for qualified Native trainers by November 30, 1987."

How do we define and are we on target for identifying these twenty-five to thirty "potential employment positions...by November 30, 1987?"

7. Item i) under Proposed Activities

"To have identified 75-80 potential employment positions for qualified Native trainers by March 31, 1988."

Is it realistic to expect the completion of identifying "75-80"...positions...by March 31, 1988" -- only five months away?

8. Item j) under Proposed Activities

"To facilitate the placement of 4-6 qualified trainers from the Nechi program in employment positions by March 13, 1988."

Based on the trainees selected for the NTD program, can we see "4-6 placements in employment positions by March 13, 1988?"

9. Item m) under Proposed Activities

"To complete a comprehensive process and outcome evaluation of training, placement, and support services by programs by March 31, 1990."

Is the evaluation report due by March 31, 1990, or should this date reflect the later startup date of the project and read June or July, 1990? Does this type of report really reflect the true need and nature of the evaluation as seen by Nechi? Nechi indicated the need for a formative evaluation process over the life of the project as opposed to more of a summative one.

10. Items n and o) under Proposed Activities

"To develop a financially self-sufficient program model for Native trainers employment service by March 31, 1988."

"To develop a financially self-sufficient program model for a Native training of trainers program by March 31, 1990."

The description "financially self-sufficient" requires defining. These two items also seem to indicate the development of tangible products, neither of which are clear to me. To forestall any potential problems in either their development or in their acceptance by the funding agency, perhaps some form of explication or clarification would help.

2. The discrepancies and errors contained in the contract are not, in the experience of the author at least, unusual. However, if there was ever a legal conflict over the terms of the contract, resolution would be very difficult and confusing for both parties. A contract (especially one involving the number of dollars that this one does) should accurately and completely reflect the understandings and undertakings of both parties. An intensive review of the contract by Nechi and a representative from the Innovations Program of Employment and Immigration Canada could help to remove most discrepancies or errors.

3. A recommendation is made that the wording of the evaluation requirements stipulated in the contract be revised to more accurately reflect the needs of Nechi Institute in terms of this project. Nechi's needs (hence the overall project's) are for formative evaluation information while the terms of the contract call for a summative evaluation. This approach fails to "distinguish between evaluation for improvement and evaluation for

determining general worthiness" (Hickcox, 1985, p. 19). To complete a review of the evaluation portion of the contract, discussions with the Innovations Officer, the NTD Project Coordinator, and the Evaluator should be held.

4. For the Innovations Program of Employment and Immigration Canada, a recommendation is made that the stipulation of the evaluation criteria in contracts, (a) more accurately reflect the nature and needs of the project (as determined in conjunction with the signing party to the contract and the evaluator if possible) and (b) not be generically prescriptive in nature (Dillon, 1984, p. 18; Scriven, 1980, p. 45). According to Patton (1985, p. 13), the most common problem encountered in evaluation consulting (and the one encountered in this instance) is "dealing with the conflicting information needs of people."

#### **Innovations Officer's Perspective**

The representative of the funder indicated that the bottom line for the project is the answer to the questions: Will it have an impact on the labor market in an innovative manner? Is the approach and process used transferable, and can it be duplicated? The transferability and replicability of the approach and the process is important. One of the goals for the project in the next year must be to address this issue head on. With the clarification and direction given to the project in the revised contract, a concerted effort should be made to chart and implement strategies related to training role identification, clarification, and development within new and existing employer organizations. An interesting observation based on an interview held with the Innovations Officer was that the specific fulfillment of each item -- a letter of the law approach -- is not what was intended by the contract. The fulfillment of each of the specific objectives and activities stipulated in the contract is less important than meeting the spirit of the contract. This indicates that changes which need to be made in the contract in order to facilitate a more realistic level of accomplishment are probably acceptable to the funder.

### **Review of Revised Contract for 1988-89**

In a meeting of the Project Coordinator, the Evaluator, and the Innovations Officer, the issues addressed in the previous section were discussed and revised. In addition, other changes were made to the goals and activities in the contract which, in the estimation of the Evaluator, more accurately reflect the project as it should be. Some of the original goals and activities were written in a manner which Ball (1982, p. 169) describes as "incoherent... (and) unrealistic." Most of the original discrepancies and unknowns in the contract were eventually removed. Here, at least in part, is an instance where evaluation information has led to some important changes being made in the project. This is too infrequent an occurrence for most evaluators. The revised contract will be reviewed and a report given at a later date.

### **Planning Concerns, Organizational Details**

1. Some of the important parts of this project have been neglected somewhat because of the intense, almost exclusive involvement by all NTD staff in training curriculum development and delivery. Each of the other sections (eg. placement, recruitment) of this project should be carefully examined in light of the contractual obligations. An assessment should be made of progress to date. This can be used to pinpoint necessary changes in focus, direction, and in the re-allocation of personnel and resources as required.

2. As soon as trainees have been selected a relationship should be established with their employer/sponsor. This relationship would be nurtured by providing pertinent information to employers/sponsors concerning the program, including the progress of the trainee. From the beginning the employer should have a good idea of what the NTD program will do for his/her employee and organization. The establishment of this relationship is essential (at the outset), not just as the practicum evaluations commence, as happened this year.



3. Completion of the curriculum by trainees is not an end but a beginning -- there should be a follow-up plan. The Project Coordinator suggested that a continuing professional development relationship should be formed between the NTD project and graduates from the program. A number of workshops (three to four per year) would be planned and designed to meet the ongoing needs of trainee graduates (attempts should be made to access funding for this). The relationship would continue for at least the life of the NTD project and should be moving towards becoming self-sufficient and perhaps self-perpetuating.

4. More time should be allotted for planning and organizational meetings well in advance of training session start-up. It is important to include all staff in these meetings so that they feel a part of the project. It is suggested that a final meeting be held a few weeks in advance of the training to review and finalize preparations. This would allow staff the opportunity to review plans and to re-check the appropriateness of the constituent parts of the training program, the sequencing and timing of delivery, and the methods to be used. The three day project planning session held in July 1987, was especially helpful in focusing the first year's efforts and in looking at the totality of the project. This would be a profitable exercise for each of the subsequent years and is recommended, perhaps as a retreat for assessment and planning purposes.

5. The daily training staff review and planning meetings were sometimes unnecessarily long. The use of an agenda in every meeting and the implementation of stricter time controls is recommended. Some of the issues discussed in these meetings were not applicable to all parties in attendance and would have been better discussed at another time with only those directly involved. The review meetings need not always be scheduled immediately after the training sessions -- next day, early morning meetings would be an alternative choice.

6. The two-week training sessions were too long and were scheduled too close together. Both ten-day workshops were held within a period of less than two months.

From the middle of the second week in each training session trainees were anxious to get home, and as a result were not able to concentrate and learn as well as they had done earlier. Training activities which are more action oriented or ones that generate a higher level of interest among trainees could be scheduled during the later stages of training. Consecutive days of training could be reduced to a week. It was suggested that four training sessions, scheduled evenly over a longer period of time (8 - 10 months), may better serve the learning needs of trainees. Starting earlier in the fall, these sessions would last up to a week in length.

7. Some of the afternoon sessions could be replaced (not added to) by an evening session or two. A different atmosphere seemed to exist in the evening workshops held during the first year. This atmosphere may be more appropriate for some training topics. Even a recess for half an afternoon with the time to be replaced in an evening might help break the routine of training. Generally, breaks during training sessions should be more frequent and shorter in duration (to reflect the physical needs of adult learners).

8. The lunch hours were occasionally encroached upon by training. It is important that the lunch time be free for trainees to use as they see fit -- for relaxation and eating, socializing, or even study. Trainers should not attempt to cover "just one more thing", thereby running over the allotted time.

9. A checklist of items which need attention, stemming in part from this evaluation and from observations of NTD staff, could be prepared and used as a guide for next year's activities.

10. The filing system developed specifically for this project, in part by Jon V. Sagen, is an excellent one. It was reported as having been very useful in helping to chart and keep track of the voluminous amounts of information in the separate areas of work in the project. A brief written description of this system could be prepared and submitted in one of the monthly reports. Wider distribution of this information might also be considered.

11. External factors can interfere with the program. For example, some of the trainees were financially unable to participate in some of the social activities instigated by other trainees. The result was that some trainees felt left out and somewhat isolated. A number of different social activities could be planned and offered at no cost as part of the overall training plan.

12. Trainees indicated there was congestion in the washrooms in the morning. Perhaps off-setting schedules could be set up to help control this. It was also suggested that the hydro-therapy facility should be kept open during the weekends. Trainees indicated that the quality of the food, although adequate, could be improved.

### **Placement/Follow-up**

There has been very little work done in terms of placement or job identification in this project to date, yet, fifty percent of the project objectives stated in the contract deal with placement. The whole question of the placement and job identification portion of the NTD project (as stipulated in the contract) has never been adequately addressed by NTD staff. The placement issue must be faced in year two and some thought given to it in relation to the contractual obligations and the overall scope and needs of the project.

1. There was at least one trainee who did not have work and to my knowledge no attempts have been made to assist this individual in any meaningful way to find employment. There may be others who would like to find alternative training positions.

2. Trainees have expressed the thought that they are only valuable (in a training capacity) to their employers if they are given the opportunity to use their newly developed training skills in actual training situations. As part of the placement/follow-up service, NTD staff could show employers how to identify specific training needs within their organization and encourage them to have the trainee provide the needed training, perhaps for their second practicum, under the direction of NTD staff. Information on how to create

and maintain an in-house training position could also be gathered and disseminated to employers.

3. The image and relationship that NTD has with the employers/sponsors is vital to the program's success. A comprehensive plan to communicate and coordinate the flow of information between the employers/sponsors and the NTD program should be devised. The NTD staff member chosen for this work should be constantly aware of the need to maintain good relations with the employers/sponsors and be capable of doing same. Missed appointments or phone calls, not enough time or interest to meet with them, etc., are all unfortunate examples of behaviours which have jeopardized good relationships. Furthermore, problems that were encountered by trainees during the training session have spilled over and influenced a few employers/sponsors resulting in some unfair or inaccurate accusations being leveled at the NTD program. If the trainees leave the program with a bad taste in their mouths, the odds are that they will communicate this same impression to their employers. Keeping the lines of communication open, and having a good relationship previously established between NTD and employers/sponsors may help in dealing with problems.

4. Employers need to know more about what a trainer does. A means of communicating this message to employers needs to be developed and used. NTD staff could develop a video tape (as specified in the contract) which would provide a profile of a trainer and a description of the role of a trainer. Also, employers may not fully understand the economic (eg. high costs of consultants) and other benefits of having a trainer on staff readily available as a resource person. As well as a recruitment device, this tape could be used by employers to help them better understand and utilize their trainers. Some of this is outside of the mandate of the NTD program, but it may enhance the impact of the NTD program on the workplace.

5. Employer expectations of the NTD program have not been properly assessed or followed up. While it is important to understand the needs of the trainees relative to

training, it is equally important to understand what employers expect from the program. A survey of employers/sponsors could be undertaken to assess just what their expectations are. This information would be used to adjust the training program and to focus the type of involvement that NTD staff should have with employers/sponsors before, during, and after the training program. A three-year relationship should be maintained with employers with the feedback used to adjust the training program as necessary (knowledge, skills, and attitudes) and to provide the desired long-term benefits to employers.

When asked, "What do you think your employer/sponsor expects from you when you return?", trainees responded as follows:

- (a) Show that they haven't wasted their time and money
- (b) Conduct workshops for other staff and in local communities (trainees indicated that they would be expected to deliver training for: group home staff, community development, prevention, networking, child welfare policies and procedures, foster care, adoptions, separation and grieving, team building, communication skills, cultural/spiritual, personal development, corporate staff, treatment staff, field educators, and out-patient counsellors)
- (c) To help the organization save money by eliminating the need for outside consultants
- (d) To train others in the organization to be able to prepare, conduct, and facilitate workshops.

All of these responses need to be considered for the next group of trainees and matched to their employer's responses. More importantly, they could be used to guide the establishment and maintenance of relationships with the first group of employers.

### **Recruitment and Selection of Trainees**

In the final analysis, the project is only successful to the degree that the graduates are well trained and utilized within their organizations. More effective recruitment and

selection may be one way to improve the overall success of the project and its impact in the employment market. A system of recruitment needs to be developed and described (as per the contract) -- one that can be replicated by other organizations -- not one that is dependent on and limited to the contacts that Nechi already had or has.

1. Recruitment efforts were directed primarily at a specific type of organization and individual, (those in the addictions field) most of whom were already known to NTD or Nechi staff. It is necessary to go beyond the comfort zone of known contacts and organizations to include other financial, political, and management groups or individuals. This will require creativity on the part of NTD staff to identify these groups and to devise appropriate recruitment approaches and plans. A single, generic approach to recruitment is not as effective as a customized plan might be. Individuals outside of Nechi whose opinions are valued and respected by NTD staff could be used as sources of information in both recruitment and selection activities. This year's trainees and employers/sponsors should also be considered as potential aids in recruitment and selection activities.

2. All NTD staff should participate in a review of recruitment and selection criteria in light of this year's experiences. The statement of selection criteria could be reviewed and revised to more accurately reflect what was actually done and to add any necessary changes. For project purposes, the selection criteria should be openly explained in writing. However, there is no need to have two sets of selection criteria (eg. political, geographical, and financial considerations) as in the first year. The criteria and the procedures used in the selection process should not be included as part of an information package for potential candidates for the NTD program or their employers/sponsors (as was done last year) unless they accurately reflect the criteria which will be used. Even then it may not be appropriate to include these criteria in any correspondence to either trainees or their employers/sponsors. The identification of generic characteristics of a trainer and their inclusion in recruitment documents might be more useful information as a yardstick against which prospective applicants/organizations may measure themselves or their personnel.

The recruiting information that is eventually sent out should be carefully scrutinized to ensure that it is clearly written and informational with a strong marketing orientation.

3. If this year's experience is any indicator, the number of trainees selected for training should exceed the number that NTD expects to complete training. In all, five trainees were unable to attend or complete the first year's training, two because of the airline strike during the first training session. The external and internal factors affecting trainee drop-out are so unpredictable that overbooking seems to be a necessary precaution to achieving the requisite number of graduates.

4. NTD staff who are to be involved in the selection process should be identified early and involved in the process as much as possible to its eventual completion. This would encourage better attention to all factors in the selection process by all members of the Selection Committee. The application of selection procedures should be fair and consistent for all applicants. Deadlines, qualifications and other criteria should apply equally to all applicants.

5. NTD staff could make better use of their time and resources if they planned to do some scouting and recruitment work while they are out conducting the practicum evaluations.

6. Not all of the provinces provided trainees for the first year. In the next two years, should the NTD program attempt to recruit trainees for the program from as many different provinces as possible (given the national scope of the project)?

## Staffing

### Staff Roles

1. Initially there was some confusion and diffusion of the roles played by staff. Specific assignments of tasks for which staff are particularly suited should be made for every segment of the project to make accountability easier. Responsibility for each part of the project needs to rest with a specific person. This will also be an asset in terms of the

day to day management of the project. With the Project Coordinator available on site for only a limited number of days each month, this role clarification and task assignment will be easier to monitor and may simplify management of the project. It will also allow staff to focus their energy upon tasks that in the first year were left too open-ended or were never addressed.

2. There was some delegation of management tasks and responsibilities to certain staff without accompanying authority. Further, the seemingly hazardous delegation and retaking of responsibility and authority to and from staff engendered problems. Individual staff members were not always clear on what their role was and what they were expected to do in that role, and their relationship to the rest of the project.

3. The inclusion of all staff in the development and decision making process for every aspect of the project was unnecessary and seemed ineffectual. On occasion this created opportunities for the expression of strong feelings (often negative personal ones) which had nothing to do specifically with the task at hand and was time consuming. Soliciting feedback from staff for decisions is entirely appropriate, but is there a need for a consensus on everything?

#### Use of staff

1. The area of the project which the staff felt the most comfortable with is, of course, training (given their extensive training experience). Staff do not have the same degree of familiarity or experience with other project tasks such as recruitment and placement, and this has led to a concentration on the training aspects of the project. This is not surprising, for as Abe Kaplan remarked, "Give a small boy a hammer, and he will find that everything he encounters needs pounding" (as quoted in Nathan, 1985, p. 718). We all tend to do that which we feel most comfortable with. It should be noted however, that in the contract half of the objectives deal with placement activities which have been almost entirely overlooked.



2. The Secretary was sometimes undervalued and underused by NTD staff. The Secretary could attend all planning meetings to keep notes on the significant issues discussed and the decisions made. These notes could serve as a road map, detailing where the project has been and where it is headed. It would also be useful as a record of the innovative, developmental processes utilized in this project. The Secretary could further assist in more of the numerous logistical tasks (eg. corresponding with applicants, contacting employers/sponsors, gathering information for monthly reports) which are part of a project of this size.

3. Other Nechi staff were told (and it was written into the project proposal) that they would be asked to provide some input into the NTD program. This has not happened to any significant degree. By virtue of their experience and expertise, Nechi staff could provide valuable input. It is recommended that some of them be used in an advisory capacity -- ask for their feedback in appropriate areas of the project. There was a suggestion that some of them (or other competent Native trainers) be used as trainers for the delivery of specific segments of the NTD curriculum. This would certainly broaden the trainee's experience by working with different types of trainers and would help the already overworked NTD staff by reducing their work load.

### **Staff Needs**

1. NTD staff have ongoing personal and professional development needs which should be met.

2. Staff generally feel they were well treated by those in charge. Inter-staff relationships on the other hand, were sometimes less than satisfactory. The project, because of a number of different factors, has been difficult and demanding on the staff both in terms of overall time commitment (a significant amount of overtime was logged in the first year) and in the intensity of the commitment. A number of inter-personal staff conflicts developed over the course of the first year. The resolution of these conflicts,

although difficult and stressful on staff (and on the project), has been beneficial and is a good example of problem solving techniques taught in the NTD curriculum. Training staff must operate as a team to be effective and this is certainly one of the principles espoused by Nechi and taught in the NTD program. It is important that mutual respect and trust be the norm in staff inter-relationships and that this type of feeling be encouraged and supported amongst staff.

3. Some staff felt there was an inconsistent application or enforcement of rules between staff and in fact even different rules for some. All staff need the security of operating within the same set of ground rules and in having them applied in a consistent manner.

4. There were conflicts which developed between Nechi and NTD staff. Along with meetings as required, an initial statement defining parameters (or roles) would help clarify the relationships.

### Establishing a Network

Trainees expressed a strong desire to forge a network between themselves and the NTD program. Much work needs to be done to develop and establish such a network. A list of addresses and phone numbers for each trainee (and trainer) could be compiled and updated on a regular basis (every six months). This list would then be distributed to all parties. A brief resume of the professional skills, areas of expertise, and interests of everyone on the list could also be assembled and distributed. This would aid trainees in identifying and locating other trainees, common interests could be jointly explored and new findings and curriculum materials, experiences, and information could then be shared with (or at least made available to) the whole group. Individuals could draw on the strength of the group for support and assistance in good and bad times. A central clearing house could be established at Nechi to aid in this process. A newsletter would be a good way to maintain a focal point for the exchange of information between the trainees and NTD. The

newsletter could be developed and produced under the direction of NTD staff. NTD may want to take responsibility for maintaining pertinent records and information for the full three years of the project, and perhaps, many years beyond.

## Chapter 3

### TRAINEE EXPERIENCES: OBSERVATIONS AND CONCLUSIONS

In a sense, first year trainees have been guinea pigs for the project. They have had to endure the trials and errors that occurred in the first year. By their presence and through their significant input, they have contributed much to the eventual outcome and product of the NTD project. According to MacDuff and Long (1985, p. 5), the value of trainee's observations are helpful "because they identified particular elements of workshop design and, sometimes suggested a direction of change that, from the participants perspective, would enhance their learning." In training, as in education, "what is intended is not necessarily what is implemented, and that in turn is not necessarily what is experienced by participants" (Lincoln, 1986, p. 3).

Figures 2, 3, and 4 (p. 29) provide a picture of trainees in relation to age, gender and the Provinces in which they live and work.

### Areas of Growth

The setting of Nechi for the NTD training program provided a unique opportunity for the inter-weaving of cognitive, personal (affective and spiritual), social, and professional growth, sometimes in unexpected ways.

One afternoon, about a third of the trainees decided that they wanted to attend a Sweat Lodge Ceremony. They had some unmet needs, and felt strongly that they needed to attend the sweat to help meet these needs. Three major things occurred as a result of their decision and action, all three occasioned learning:

- (i) For the trainees that remained in the training session, the training activities lead into a discussion of the ramifications of the decision that the other trainees had made. One, they were missing some important ideas and concepts which could not be repeated because of

Figure 2 Age Distribution of Female Trainees

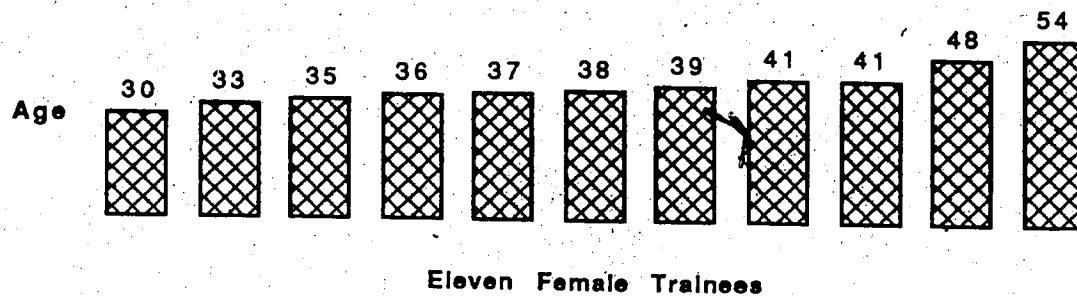


Figure 3 Age Distribution of Male Trainees

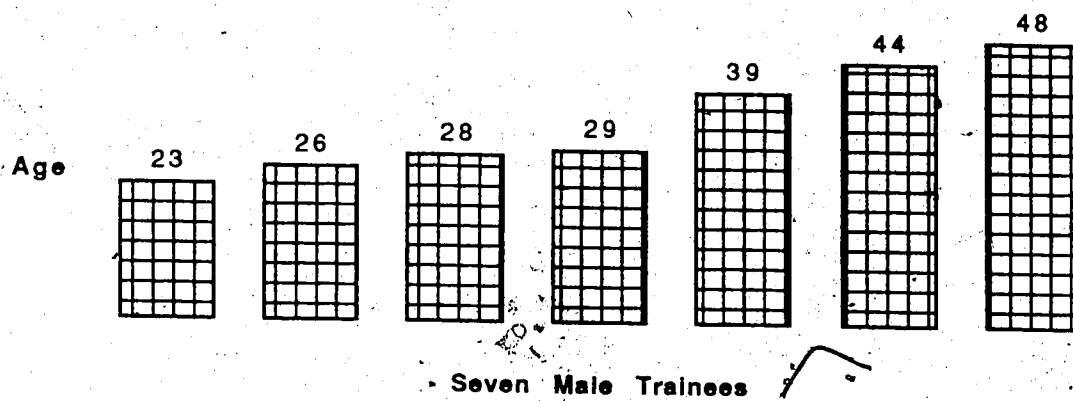
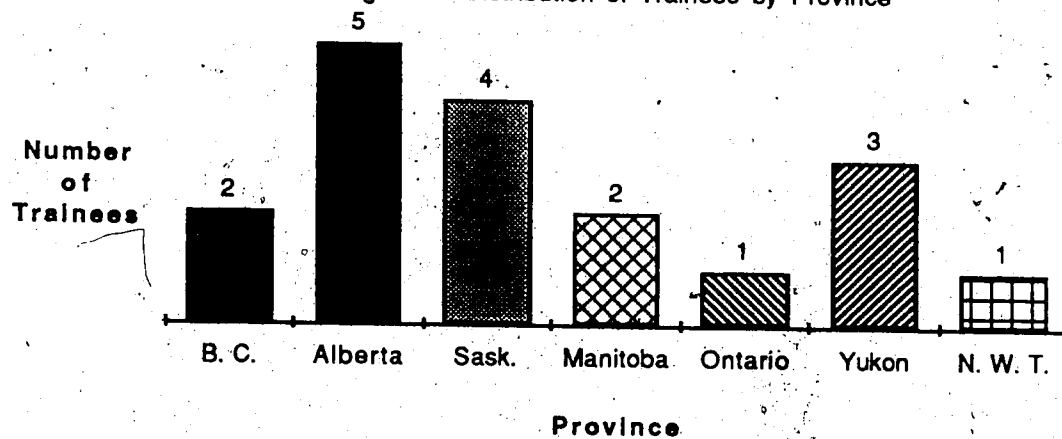


Figure 4 Distribution of Trainees by Province



time constraints. Two, they had disrupted the remaining group by upsetting the mood of the training session, and they also affected the eventual delivery of the afternoon lesson because it had been designed for the larger group and had to be redesigned for the smaller numbers. Three, they had broken one of the rules of the workshop, by being absent from training for more than two hours without permission to do so. The possible consequences to trainees of this absence from the program extended all the way to expulsion from the program. The discussion that the remaining trainees had provided a unique learning experience. The trainer had the presence of mind to turn this discipline issue into a training problem for the class to work on. Trainees were able to look at and deal with the issue first hand, in a manner similar to that which they would encounter in their own training workshops back home. With the assistance of the trainers, they were able to look at both sides of the issue -- almost in a detached manner -- lay out all of the issues, and try to determine how they would resolve this issue in their own training workshops.

(ii) every one of the trainees who left the workshop to attend the Sweat Lodge Ceremony stated that their needs were met in a most significant way. Their experience was unique and provided a necessary opportunity for personal growth. In spite of the consequences to them, these trainees indicated they would do the same thing again. The need for personal growth met by attending the Sweat Lodge Ceremony was more important to them than any cognitive learning they might have received.

(iii) The trainers were left to decide what to do with those trainees who had been absent from the workshop. NTD staff found themselves in an awkward position because one trainer had given some kind of approval (at least tacit) or had suggested that the decision was up to them. In dealing with the issue it was agreed that there would be no expulsion of the absentee trainees and that whatever discipline would be meted out would be over the issue of lost hours of training time. Assignments were given to trainees to complete work that would make up for the lost training time. Some of the trainees

completed the assignment, but many of them felt that it was unfair, arbitrary punishment. These trainees felt somehow they were being punished for fulfilling an important personal growth need. Other trainees who had missed time -- for a variety of reasons -- were not required to make up the hours that they had missed. This seemingly preferential treatment was viewed by trainees given the make-up work assignment as unreasonable and they felt they were being picked on. They had some justification to feel this way. However, all agreed to complete the assignment and bring it back to the next workshop some four weeks later. A couple of trainees worked very hard to complete the assignment, while the remaining trainees decided not to complete the assignment because it was unfair and was more of a punishment than a useful exercise. The assignment, which was to write a brief report on the training manual used in the course, was apparently not given clearly. As a result, there was a misunderstanding of what the actual assignment was. The trainers chose not to follow through with the original decision and allowed those trainees who had not completed the exercise to choose some other exercise. It is uncertain whether these trainees ever completed this assignment.

Based on this experience, the following observations are made: (a) Needs for personal growth sometimes eclipse the needs for cognitive growth. Provision for both should be made in accordance with the assessed needs of trainees in this regard, and (b) discipline problems were fostered by unclear ground rules and inconsistent enforcement of same, and (c) opportunities for unplanned learning will occur. Trainers should be ready to adapt or redesign their training session to accommodate these needs.

Observations were made in each of four areas of growth (cognitive, personal -- affective and spiritual, social, and professional). These are reported as follows.

## Cognitive

Many trainees, eager to attend the workshop, went to great lengths to gain admittance to the program. This interest on the trainees part helped create a positive atmosphere for learning. This should be encouraged and allowed to develop in trainees. One trainee commented, "Sometimes our minds are lazy. This workshop has made me get back on track-- helped push myself mentally, to learn and to change." There is merit in pushing and challenging trainees to do more, to reach beyond. For some trainees, this workshop was the first formal learning environment they had been in for some time. In part, that would account for the disparate feelings expressed in relation to the training and their concerns over their ability to learn and complete the training.

Trainees were asked at the beginning of the NTD program, "What do you expect (want) from this program." Trainees responded that they wanted to:

- (a) Improve facilitation skills, planning and design capabilities, and delivery skills
- (b) Learn how to prepare a workshop - improve and use their written skills
- (c) Identify referral agencies
- (d) Learn to deal with group conflicts
- (e) Learn new energizers, games, group relaxers
- (f) Identify new books/articles and materials
- (g) Understand more about promotion and advertising
- (h) Gain an assessment of (their) professional growth
- (i) Tap into ideas and experiences of the group
- (j) Identify and maintain contacts
- (k) Polish my skills
- (l) Be able to identify problems, assess needs, and implement solutions
- (m) Help myself and others (staff, Native organizations) to be able to formulate ideas into workable plans



Although most of these expectations were adequately covered in the training workshops, two items (f and h) were touched upon only briefly, while two items (c and g) were not addressed at all. With this kind of information made available from a needs assessment completed prior to the next series of training workshops, the training could include some things not planned for or might even focus more on some items.

1. Everyone of the trainees gained new learnings; discovered new concepts, identified new methods and techniques, participated in new exercises, and used new materials. For example, the problem solving wheel was an important, new concept and tool for some. One by-product of the lesson on the problem solving wheel (medicine wheel) was personal growth for trainees. The lesson taught that there is a way to deal with their own feelings and to learn about themselves. As well, the lesson taught a problem solving method in training terms. ✓

2. Many of the trainees indicated a number of the concepts and ideas presented in the program were not new to them. What the program did was to give structure to their knowledge, a way to organize the data, and a chance to experiment with it.

3. The experiences which trainees had in the time between the NTD training workshops were beneficial. This experience helped to bring the training experience into focus, giving them a better personal perspective on training, its purpose, and potential for use within their organizations. In some ways, the time away as important as their time in training. An effort should be made to plan for and to use this time to advantage.

4. Most trainees came back from their practicum experiences with a sense of inadequacy as trainers. Perhaps trainees felt this way because they had climbed to a new plateau in their training ability and from this new vantage point realized there is much more to training than they had previously thought. Although this new perspective engendered some sense of inadequacy, the larger picture may encourage continued professional growth

and development. This understanding and desire will fit well with the proposed (subject to availability of sufficient funds), ongoing professional development seminars for trainees.

5. Trainees were asked to keep track of a journal. This enhanced learning as it gave them a chance to clarify their thoughts and feelings in writing. This repetition and confirmation of experiences and feelings resulted in the synthesis or discovery of new ideas or feelings, and in a structuring of their training experiences.

### **Personal (Affective and Spiritual)**

Trainees indicated an intense need for personal/spiritual growth. Edwards (1987, p. 32) indicates that, "Clients may come into (training) . . . with life experiences that support or inhibit their ability to achieve desired outcomes." For some, this need for personal/spiritual growth was greater than their need for training. Many trainees indicated that the personal growth experiences were important to their overall trainer development because when they become healthy they learn and progress faster. Trainees also felt that personal growth is essential to their becoming good trainers and that as they become whole, they will be of more use to their employer. In the affective domain, trainees were able to understand themselves better and to appreciate that their wholeness (spiritual, emotional, and physical well being) is important. The importance of this to trainees cannot be underestimated. For some of the trainees, personal growth activities took precedence over their cognitive learning experiences in the training workshop. This raises an important question; should we allow and encourage personal growth at the expense of cognitive learning or vice versa?

1. In relation to the issue of personal/spiritual growth and culturally relevant training, trainees provide the following comments. These are given verbatim, with some minor additions, as they were written in the trainees' journals.

- (a) There is a willingness to use Native in the program title to access monies for funding purposes. Yet when it comes right down to it, the Native needs of the group are being ignored. How many ways, how many times, how many different people have to share with them what they already know . . . and won't admit as a serious flaw in the program plan? There remains an unwillingness to be flexible - to revise the design - even a resistance to the suggestion is obvious. In the one page pamphlet we received, it states the advantages and disadvantages of cultural attitudes and values. It hasn't been addressed yet. Also, the NTD project goals and objectives number 4 . . . "provide critical, previously unaddressed services which both directly impact employment of Native professionals." This is where the real need is - not in the white society of big business. Over 90% of the design is geared to the mental capabilities (needs) of group members. There is a severe imbalance of the body and soul components of learning. There is little opportunity . . . to make learnings in these two areas. So the issue remains unaddressed. There is an inflexibility to adapt the design to be culturally relevant to Native professionals in Native communities.
- (b) The fact remains that the group was (composed of) hand picked professionals. Each very committed in his or her own way for the betterment of our Native family. I would assume some, if not all, are over-extended in trying to maintain their personal and professional commitments for the improvement to Native people. (A) comfort level was established to one of emotional safety. Obviously (it is) very (necessary) for these professionals to take some time to reflect personally in areas which (are) easily pushed aside in the daily rush of their busy lives . . . time to examine their own neglected needs. How can anyone say that Native culture is part of the program if the spirituality is neglected? We all know how interrelated spirituality is within the Native way of life. To be authentic it

has to be included. I am not saying force people to experience it but allow for the opportunity and freedom of spiritual experiences.

- (c) Before I went to Nechi, I felt alone and isolated in my own ignorance of my Native culture. I thought I was the only Indian who was out of sync with my own Indianness. It is an important element not to be ignored because it can only bring renewal of energy and commitment to what lies ahead.
- (d) I presume that in the selection of trainees that there was (to be) a level of mental, spiritual, emotional and physical development accomplished by these individuals prior to (their arrival at) NTD. . . It is up to us as individuals to seek our resources - follow their teachings and develop our disciplines but to be here for the process . . . I want to be good at what I do, I need skilled assistance - that's what I came for.

2. Trainees indicated at the last training session that to make the NTD program culturally relevant they would like:

- (a) To have an Elder present in all training sessions and after hours to help them in their personal and professional growth.
- (b) To use the Elder to plan and conduct a number of different activities outside of the training workshops (eg. Sweat Lodge Ceremony, Pipe Ceremony, Sacred Circle)
- (c) To plan and conducting a session on how trainees can identify and use an Elder and other cultural/spiritual resources for their training workshops
- (d) To have Native trainers provide the training

A number of trainees commented that culturally relevant training can only be provided by trainers who are not only Native but are actually living the cultural and spiritual dimensions of their people. They felt a trainer, "can only reflect that which they are . . . you can't have Native trainers who are not in touch (in a positive manner) with their own

Native identity providing culturally relevant training." From the perspective of some trainees the only significant Native input was that the training was delivered by Native trainers. It is reported that tremendous improvements have been made in programs, "in part because of the use of traditional healing ceremonies based on Native philosophy" (The Four Worlds Development Project, Adult Education Series, Discussion Paper One, 1984, p. 11).

3. The Where are We's (formalized opportunity to express feelings in the training workshops) were perceived by some trainees as being an important part of their personal growth. Some were very much in favor of them (including the extensive amounts of time they consumed) while others felt they were important but that they detracted from training by raising too many emotional issues and consuming an excessive amount of training time (one lasted half a day).

A variety of opinions were expressed by trainees concerning the time spent in the Where are We's:

- (a) The Where are We's are very good . . . things have been building up within me back home and I could not release them . . . but I have been able to release them here . . . I haven't been able to concentrate as much but this has cleared up a lot now and I will be better able to concentrate.
- (b) We are all here for the same purpose - but each with different needs. (Where are We's were) one of the negatives of the workshop - not sure that a workshop is the place to bare one's soul. This is new to me but I understand that it is common in treatment programs.
- (c) If they (the NTD program) think they are going to find twenty, whole, healthy Native trainees they are sadly mistaken (because of this, Where are We's are an important thing).

- (d) I can take it or leave it (the WAW's, hugs, prayers etc,) - it would not be appropriate in the North however.
- (e) What was important was what happened during training and I feel that the after hours are my own. . . . I felt no need to bear my soul.
- (f) Mind boggling, incredible, excellent . . . glad it came mostly from the group. . . would have questioned the trainers motives if they had done this themselves.
- (g) Could have had limits on the WAW's . . . not very helpful to the group after the first one.

4. The prayers and hugs were appreciated by almost all trainees and they felt they should be retained in the program. According to Patton (1980, p. 149), "Physical contact and hugging . . . was a direct indicator of the level of affective sharing and caring that had emerged in the group." They seemed to be a good way to start and close the day's training activities. Those prayers given in English were appreciated by many as they could not understand some of the languages used by other trainees or trainers.

### Social, Networking

A closeness existed amongst trainees as a result of the time they spent together, both in training and social activities, which will bind them together and carry over into their professional lives, forming a foundation upon which a network or association of Native trainers can be built. "The Director-General of Unesco (sic), M. M'Bow suggested that one task of adult education was to promote social cohesiveness" (Bown. 1985, p.5). Out of their association came many new ideas and information, and the combined strength of the group seemed to build renewed faith in themselves as trainers and as people. This resulted in increased motivation and desire to learn how to be better trainers and to use this as a tool to move forward their personal and collective visions with confidence and energy. This is an important outcome of the NTD program. One trainee stated that the NTD

program reside within the trainees and goes with them when they leave. The strength of the bond that exists between trainees; the more they interact professionally and personally after they leave the program and the more support they have, the more likely they are to have a substantial impact in their work individually and upon Native communities collectively. This networking has already happened to a small degree, primarily on the strength and initiative of a number of trainees. Trainees and NTD staff both indicated the need for the development and promotion of a network between both parties.

### **Professional**

1. One of the common reasons for trainees being at the NTD program is their desire to learn new skills, and to gain new knowledge and understanding of themselves and their people so they can better serve them. There is a strong sense of commitment to helping Native communities grow and develop their potential, to help them out from under the burdens of alcoholism, poverty, and ignorance of themselves, their culture and traditions, and onto a road of self-sustaining strength and self-government.

Trainees were asked, "What is a trainer. What do they do?" The responses are summarized below.

- (a) An individual that prepares, facilitates, and presents a workshop that is geared to accommodate the needs of the group
- (b) A person who helps trainees process knowledge, develop skills, and who recognizes and deals with attitudes, and is a good role model. A trainer must be open minded and willing to learn during the process.
- (c) A trainer is a person skilled in assisting adults to solve problems, learn new skills, or exploit opportunities as they arise
- (d) A person who provides the setting, climate, techniques, and information for the promotion of personal and professional growth for participants

- (e) One who develops and guides a process for learning
- (f) An individual who facilitates a learning process in response to needs
- (g) Someone who, because of experience, is sensitive to the needs of others and helps in achieving objectives/goals via the helping process

In addition to these interesting comments intangible qualities such as desire, drive, and motivation, need to be recognized as being important.

2. Already the NTD training program has had an impact on the individual trainees and the organizations in which they work. Trainees reported that they are being called upon to assist in planning and helping to create a process for organizational change. One trainee was promoted, he feels, as a direct result of the NTD training experience. (This is an indicator of the program's importance and usefulness to the employer.) Others were given much more responsibility to provide training in their own organization and outside of it. Some became "instantaneous" leaders. More information could be gathered from employers on the effect and impact that trainees are having within their organization as a gauge or indication of certain success parameters for the program.

3. A couple of trainees learned that although they did not want to be fulltime trainers they did want the ability to provide training when necessary in their jobs.

### Obstacles to Growth

1. Trainees felt confused over what a trainer is. This was caused by what some trainees felt to be poor role-modeling by some trainers (as evidenced by the tentativeness of the training program both in design and delivery) and in the lack of an overall picture of the training program. These events did not help trainees to see clearly their own roles as trainers in their organizations. Somewhat facetiously, one of the trainees wrote, "A trainer's ability depends on 50% personality, 25% the personality of the group, 24% techniques, and 1% represents one of the great mysteries of life. If this sounds confusing,



great, I'm well on my way to becoming a trainer". NTD trainers cannot escape being role models.

2. Trainees occasionally engaged in activities that interfered with their ability to learn in the training workshop. Late nights were common for a number of trainees. They arrived at training tired, not mentally alert, and because of this, their emotions were often close to the surface. This interfered with their own individual learning and with the learning of the group as a whole. The group's energy levels suffered. In addition, emotions flared and effectively shut down the training for periods of time.

3. The two-week training sessions were unnecessarily long for trainees (they could not keep up their level of concentration). Trainees were looking forward to going home by the beginning of the second week of training. As well, some individual training classes extended beyond trainees ability to maintain interest or concentration. Most of the breaks were long, rather than shorter, more frequent ones.

4. Being accepted and supported by the circle was very important to trainees. Those that felt left out or not accepted experienced some frustrations in their emotional relationship with the group. The impact of this was to impede learning.

5. A number of trainees expressed dislike of the use of profanity in the workshops by trainers and trainees alike. They requested that profanity not be used in the sessions. This request was acknowledged and adhered to for only a short time.

6. Trainees were disturbed by issues (eg. emotional confrontations) which kept resurfacing and slowing down or stopping training. They felt there should be proper procedures or channels to deal with this so that disruptions could be kept to a minimum.

7. There were variations in trainees' learning abilities. One trainee felt very rushed by the teaching pace, while others felt it could have been faster. One trainee stated she "needed more time to look at materials/topics, process it, put it away, go back to it and see what she knew, and then get feedback."

8. Trainees who did not have extra money were restricted from attending the various social activities.

## Chapter 4

### TRAINING PROGRAM: OBSERVATIONS AND CONCLUSIONS

The NTD training program, when completed, should be on the leading edge of Native training of trainers programs, and should be a model program, national in scope (as stated in the contract). The first year's training program was researched, assembled, and prepared for delivery in less than four months. This is a remarkable feat! Given the short period of time in which this occurred (and the fact that it is a three year, pilot project), it should be expected there would yet be work to do. The training program developed to date contains most of what would be expected in a quality training of trainers program. The ongoing development of this training program will require a concerted, continuous effort on the part of NTD staff. Of course, in its present stage, the program is incomplete. One trainee commented, "It appeared as though the planning for the training was conducted in a square and that the training was implemented in a circle." Other trainees commented there appeared to be some uncertainty in the planning and design of the workshops, and that sometimes the transference from design to implementation did not go smoothly.

In expectation of the training programs' continued development and completion, a number of observations and suggestions are offered.

#### Assessment

1. Ideally, programs should be adapted to fit the individual, not vice versa. It is altogether too common an occurrence that, "programs are based on preconceptions about specific client needs which have not been empirically validated" (Edwards, 1987, p. 30). An assessment of trainee needs (including cultural/spiritual ones) prior to arrival at training would provide useful information for selecting content (or portions of same), sequencing of training activities, methods of delivery, etc. A needs assessment would help ensure that

training is relevant and practical and that cultural/spiritual expectations are also met. "Knowledge of client characteristics that are relevant to program delivery is a fundamental requisite for planning" (Landsberg, 1983, as quoted in Edwards, 1987, p. 28). Without some idea of the level of understanding and prior training of trainees, the content and method used in the NTD program may be entirely inappropriate. In the last training workshop for this year, one trainer decided to deliver a session on a topic that was not well received by the trainees. One trainee asked, "Why are we doing this?" The trainer indicated it was given in response to a recognized need. How did the trainer know this was the case? Based on the trainees response to the activity the need was not their own. A needs assessment will get trainees involved thereby promoting ownership of the program, content, and process to some degree. This is important if the training program is to be successfully incorporated into their personal and professional lives.

2. The use of a learning style inventory instrument at the beginning of training, or if possible prior to the commencement of training, as a means of assessing individual learning styles should be considered. This information could be used as an aid to ensure that training program planning and delivery accommodate trainees' learning styles and needs more accurately.

### Program Design

All curricular materials could be laid out and inspected for inconsistencies, incompatibilities, contrasts, etc. A format for each section of the training program could then be developed and consistently followed. This would include all written documents used in training, curricular or otherwise. Each section of the training program should be strong enough to stand on its own; well organized, consistently formatted, and well documented with pertinent references and articles. Each of the training program components should be related to and relevant to the overall training program. This was not always clear in the first year's training sessions.

Based on response to the program from other agencies interested in developing an in-house training of trainers program, the NTD training program, with some fine tuning and finishing, could be marketed as a stand alone package that could be used by an agency, or as a training program with delivery coming from resources identified and developed in the NTD program.

1. Some consideration in planning training program (and delivery) should be given to understanding and attempting to balance the affective vs. cognitive needs of trainees. Is it enough to try to give them knowledge and improve their skills without trying to influence their feelings and desires or, without motivating them?

2. Trainees, with their new knowledge, will have to make a transition back to their workplaces. The environment and types of training activities trainees will be expected to perform in their own workplace should be a determinant in the overall design of a training program and in the design of its specific parts.

3. Trainees come from different cultural/social/economic backgrounds. This demographic information could be gathered, analyzed, and taken into consideration when designing and delivering the training program.

4. Different, optional sections covering the same basic concepts could be developed and included in the training program package. From these various plans for a given topic or idea, a selection could be made of the lesson plan that best suits the needs/learning styles of the trainees. For example, there are many different ways and methods to teach about goals and objectives, ranging from complex to simple, from conceptual to experiential. One, or a combination of them may be the best approach for a particular group and for the style and preference of the trainer. The content of any particular section of the training program needs to have this flexibility to accommodate the trainees' differences in levels of understanding. This flexibility of lesson content would make this model program a reflection of important adult learning theories. Each of these training modules should be developed so different trainers using them will be able to readily understand and use

them. The trainees indicated they wished they had a package of training materials (covering a variety of topics) they could use in their own workshops. The task of developing and assembling this material is one that NTD staff may want to consider in cooperation with interested trainees.

5. There appears to be a need for a continuation of some type of formal learning relationship past the end of the NTD program as it currently exists. One suggestion that was made would be to provide 3-4 continuing professional development type seminars in the coming year for the trainee graduates. The seminars could range from 1-3 days in length and could cover topics or issues of importance to the trainees. A needs assessment should be conducted and the findings used in designing the seminars. The cost of providing these seminars will have to be built into the existing budget or an application for additional funding be made.

6. Lessons were not always designed so that they could be completed within the time allocated.

7. An explanation of topics covered in the NTD training program was not prepared and distributed to trainees in advance of their attendance at the training sessions.

### **Training Program Content**

1. There were occasions in training when confusion arose over use of certain concepts or ideas. Sometimes these were misunderstandings in terminology (as in the design sheets), in concepts, or in application of these. Some of these were so important that when they were left unresolved in the minds of the trainees, serious impediments occurred relative to trainee learning. For example, the boundaries, overlaps, and differences that exist between training and facilitation as concepts, activities and meanings, were painfully made.

A general consensus of terminology and concepts used in the training program was not reached by NTD staff. The development of a list of competencies for each of these

areas went some distance towards clarifying the confusion. On closer inspection however, there are still many incongruencies within and between the lists of competencies for training and facilitation. A more circumspect look at these competencies as individual entities, their relationship to each other, and most importantly how they will be perceived by others, must take place. This should result in a list of clearly stated, distinct, conceptually and pragmatically congruent competencies for training and facilitation. An outside, expert opinion could be sought to help in formatting these competencies so that they are improved in terms of content, language and meaning.

2. For most trainees this year, the use of certain terminology inhibited learning because of a lack of common understanding. A brain-storming session at the beginning of the workshop to explore and identify the different or congruent understanding of terms would help to pinpoint potential difficulties before they were encountered in a specific lesson and would allow for the assimilation of this information into a redesign for that lesson if necessary. The brain-storming session could lead to the development of a list of buzz words.

3. Some of the theoretical content could have been more experiential.

4. Use of a wide variety of energizers, exercises, and games was well received by trainees. A list containing this information could be developed and distributed to trainees.

### **Scheduling, Sequencing**

1. Training, to be effective, must provide the opportunity for trainees to assimilate, digest, and then to process information. This means that sufficient time should be scheduled in the project for this process to occur.

2. It is very important to allow for a formalized, honest, in-depth, sincere and open expression of feelings (Where are We's), especially in Native training programs. There should be concern, however, when the focus and direction taken in the Where are We's leads away from the group's best interest, or opens up issues which are only important to

one or perhaps a few individual trainees. Trainees were divided over the merit of Where are We's relative to the amount of time they consumed from the training schedule. If they are deemed to be important to the overall program they should be scheduled so they do not take away from other essential training activities. "Time should be budgeted to best enhance the adult learners responsibility for their own problem solving" (McDuff and Long, 1985, p. 7). It is unfortunate that the opportunity for growth provided by the Where are We's is not used more often outside the Native community.

3. After development of the training program has reached a certain stage for the coming year, it could be reviewed by various people such as: Nechi staff, other trainers, the Evaluator. Their input may be valuable in identifying deficiencies or problems of sequencing in the training program prior to using it.

### Materials and Resources

1. In planning to meet the cultural/spiritual needs of trainees, planners should be aware that differences among Elders and their respective methods may lead to confusion on the parts of some trainees because they differ from their own beliefs and traditions. With some planning, Elders could be used in almost all training sessions as an aid to trainers and trainees in helping to make training culturally relevant. This would provide a different perspective to these activities and would offer an opportunity for trainees to learn how to work first hand with an Elder. Additionally, the Elder could plan and conduct Pipe Ceremonies, Sweat Lodge Ceremonies, Sacred Circles, etc., during times which would not interfere with the training program. Trainees indicated that a class on how to deal with and use Elders as resources in their own workshops would be helpful.

2. Only one text reading was assigned to trainees during the course of the training sessions. There was no follow-up to see if the reading was done or any attempt to relate the reading to the particular lessons it was designed to augment. The text book itself is functional and useful but somewhat dated and not very interesting to read. Current



articles, books, and a bibliography should be identified and used as course materials for trainees. Readings and materials should correspond with and add to the individual lessons for which they are designed.

3. Time could be spent in identifying new reading resource materials. Graduates from the first year may be able to provide resource materials or perhaps direct staff to appropriate sources.

4. The handouts should be reviewed to ensure that they are error-free, of good quality, relevant, and readable.

5. The big binders given to trainees were very cumbersome and awkward to use, especially considering there were no tables to write on.

### **New Training Program Directions**

1. The following were identified by staff and trainees and are suggested for consideration as part of next year's training program: (a) two areas of knowledge identified as being important for a trainer to know are co-training and co-facilitation. A list of competencies could be developed and tested for each of these and would form the basis for a new section in the NTD training program dealing with these topics: (b) another suggestion for a topic to be included in the training program would be, "Healthy Trainers - How to Become One, How to Stay One - to be held at the beginning of the training session. This would allow trainees a chance to become aware of, and to explore their own feelings in a training setting so that they can be better prepared to cope and deal with them away from the training workshops. This personal development session held at the start of the training program may also help in assessing candidates for the program: and (c) a session on how to identify and use cultural/spiritual resources.

2. The issue discussed in the last training session was that of ethics. What should trainers do when faced with delivering training on an issue they have not yet dealt with in their own life, eg., sexual abuse or family violence? A discussion ensued which raised the

larger issue of standards for trainers, a code of ethics. Some attempt could be made to develop a set of standards or a code of ethics for trainers in much the same fashion that the list of competencies were developed. This work would certainly be useful beyond the confines of this program.

3. A section of the training program which could be expanded is the one dealing with adult learning principles and theory. More current research could be examined, presented, and used in the training by the trainers as examples of adult learning theory, eg., advance organizers. Another section that warrants further investigation would be the characteristics of adult learners (effect of aging on learning, memory, etc., and especially characteristics of Native adult learners).

4. Trainees will always encounter criticism in their work as trainers. NTD could help prepare trainees for this eventuality by teaching them ways to understand and to cope so they can better deal with criticism in their own workshops.

### **Trainee Assessment and Feedback**

#### **Testing**

1. There was no statement to trainees indicating that their progress was to be graded. Trainees want and need to know how they are progressing, what their areas of strength and weakness are, and how they are doing in relation to others in the program. One of the trainees who did not feel confident in the training workshops felt that she didn't have an adequate grasp of the information partly because she had not received any individual feedback. As a result she felt that she might be wasting her time and the resources of the program. Testing and feedback must become part of the training program. Trainees are not the only ones that will benefit from this information. Trainers will have a better feel for what they are accomplishing as they train. Information that would give direction for adjustments in any area of the program could also be gathered indirectly as a result of this process.

2. Testing of outcomes relative to each training program component should be built into each component. An example of the need for testing on the specifics of each training program component was provided by one of the trainees who was asked what he had learned about adult learning theory. He confidently stated that he had learned a great deal about it but when asked to describe what some of the theories were, or how they worked, or their use in training, he was completely unable to do so. How much did this trainee know about adult learning theory? Somehow, the connection did not take place in the training program. In fairness, the trainee may have been able to demonstrate Adult Learning theory but was not able to articulate it. This raises the larger question, how much did each trainee learn about any portion of the training workshops? What would be the result of testing the whole class on their knowledge of material covered in training? Answers to these questions might provide unexpected insights on trainee progress in the training program.

3. The competency-based aspect of training was thought to be capable of addressing the testing issue on its own, without further action. This is not the case. In the lesson on workshop design for example, each trainee should be able to identify his/her product (the design of a workshop) in relation to a set of standards on workshop design. Secondly, they want to be told how they are doing in relation to those standards, or in relation to the group as a whole.

4. There was reluctance on the part of a number of trainees to be evaluated regarding cultural/spiritual competencies. The evaluator was unable to uncover reasons for this and felt inadequate in this regard. The trainees themselves would not or could not explain this to the evaluator. This issue needs to be explored further and some understanding gained by either the evaluator or NTD staff.

5. With some kind of a testing program, employers/sponsors desiring information could be given a more accurate picture of their trainee -- his or her weaknesses, strengths, and progress.

## Practicum Evaluation

### Purpose

Two practicums lasting three days each were to be designed and delivered by each trainee. An important part of the overall program, practicums provided an opportunity for trainees to demonstrate their understanding of, and their ability to use, their newly acquired skills and knowledge and to reflect their attitudes regarding the NTD training in an actual training setting. The main problems encountered in the practicums occurred in relationship to the evaluation component. There was some confusion for both trainers and trainees over the purpose of conducting an evaluation of each practicum. Were trainees evaluated for purposes of grading or testing in relationship to graduation requirements of the program? Were they evaluated for the purpose of providing feedback to trainees to help improve his/her performance? Were practicum evaluations to be used as a source of information for employers/sponsors regarding the progress or level of standing of a trainee? All of the above stated purposes are appropriate. Whatever the reasons are for conducting the evaluations, they need to be stated and included in the program description given to trainees.

### Conducting the Evaluation

1. Each of the purposes stated for conducting practicum evaluations in the above paragraph influence how the practicum should be conducted, that is, what instruments to use, what questions to ask, what the results will be used for, and who will receive the evaluation results.

2. Practicums can be a valuable learning experience. Although they do not need to be negative, in this project, the natural aversion that people have towards testing or evaluation was compounded by the negative practicum evaluation experience of trainees (Patton, 1984, p. 6). The unknowns regarding the evaluation ---its purpose, the

procedures and methods to be used, who was going to do them, how fair or objective the evaluator would be -- all contributed to high levels of anxiety in trainees.

Another concern was confidentiality of evaluation results. One trainee's completed practicum evaluation forms were left on the table in the training room by a trainer for a couple of days. The problem had to be brought to the trainers attention by the trainee before it was taken care of. How trainees feel about the practicum evaluation may be as important as how well it was conducted or the actual results of it.

3. An important question was raised in a panel discussion with trainers during the last training workshop. The discussion centered upon the question of consistency in the conduct of practicum evaluations by the different trainers. Differences in their conduct was viewed by some trainees as being unfair. This point was not answered to the satisfaction of either the trainees or the Evaluator. Not only must the procedures and approach to the evaluations be the same, but the method of implementation must be circumspect. Inconsistency in the conduct was due, in part, to the lack of a common understanding and agreement over what evaluation is, over how it is done, and over what the purpose is. Some trainees wondered if they should be able to select the trainer they want to evaluate them and whether they could be evaluated by the same trainer for both practicums? A response to this question by NTD staff is in order.

4. To gain a better perspective on what evaluation is like, trainees could sit in on other trainees workshops as observers with the assignment to take notes of the ideas that might be useful when they conduct their own workshop. This would benefit both the trainee observing and the trainee who delivered the workshop. Viewing a program from the perspective of an evaluator would help trainees look critically at training. According to Bhola (1982, p. 11) this would help "improve delivery of their own training." Their feedback may also be useful to the trainee they observed. The feedback would not be in the form of an evaluation report on the workshop observed but rather a personal planning document for the benefit of the observer.

5. The information from every practicum evaluation should be analyzed. Any noted deficiencies or problems common to most of the practicums would indicate some need for additional training time in those areas. A comparison of the two practicum evaluations could also be used to assess the improvement of program participants.

6. The package sent to employers concerning practicum evaluation was confusing to some. Here was an example of needlessly providing too much detail. If employers are to be involved in the practicums primarily as observers on how participants perform, the information they need to perform the task should be very simply explained.

### **Planning/Implementation**

1. The practicums were to last six days in total. There was no consistency in following this stipulation. Some trainees delivered a three-day workshop in conjunction with one or more of the other trainees where each of these trainees would have delivered one and a half days of training. This was accepted as fulfillment of the requirements for the first practicum. Other trainees who delivered a workshop on their own which lasted only two days were given the impression by their evaluator that this was not good enough. Still others who used a resource person in the delivery of the workshop were told that their workshop was not long enough because the resource person used up a significant portion of the time. Rules governing the conduct of the practicums must be clearly set and then adhered to by evaluators in a consistent, equitable manner. Although circumstances may dictate some variation in this (every practicum does not have to be the same length), decisions must be made within some general guidelines.

2. Trainees are naturally apprehensive about their practicum. Positive reinforcement and frank discussion of the practicums early in the training program may help alleviate some of these fears. The trainee's initial package of materials (or even the materials used in marketing and soliciting for the program) could contain all pertinent information concerning the practicum. This may help remove misunderstandings over this aspect of the program.

3. When the practicum evaluator gives feedback to the trainee, this should not be one-way corrective type communication. The evaluator should encourage the trainees to connect with and express their feelings and observations of the workshop first. Then the evaluator can confirm and reinforce or add comments as necessary. This approach will be more acceptable to trainees and will reinforce learning.

4. When trainees conducted joint workshops, one of the common complaints expressed was the lack of time they had for joint planning of the workshop. Some trainees did not realize how much time it takes to research and develop a workshop and did not schedule sufficient planning time to complete their designs. This raises the issue of how to evaluate joint presentations. Some thought should be given over how best to do this.

5. Trainees indicate they wanted a group debriefing session after the second practicum session where they could share their experiences with other trainees. Such a session would allow for an important exchange of information for both trainees and NTD staff.

6. In the first year, there was a significant cost involved in the conduct of the practicum evaluations which were conducted at or near each of the trainee's work location. The cost effectiveness of this approach is questionable. One alternative would be to schedule an in-class practicum, perhaps a day in length, during the course of one of the training workshops. Another alternative would be to plan to conduct the first practicum evaluation on site at Nechi, or in proximity to Nechi. The NTD staff could identify nearby groups or agencies with training needs. Trainees could select an agency, do a needs assessment, and plan and deliver a workshop they were capable of or for which they were suited. The cost to evaluate the trainees practicums in this way would be significantly less than having to travel across the country to wherever trainees were conducting practicum workshop.

7. Practicums were to be conducted in two, three-day sessions. A variation in the total amount of time and in the division of the time into workshops should be considered.

Is it necessary that the practicums last a total of six days? Is a split of the time over two workshops the best approach? Whatever approach is taken, it is important that the practicums, including the evaluation portion, be a positive learning experience.

8. One trainee felt that he could not possibly be competent in all of the competencies listed on the practicum evaluation form. This worried him, and rightly so. It would be almost impossible for evidence of competence in each competency to be shown in a given practicum workshop. This raises the question then, "How do you assess competence or progress when no indicative data can be gathered?" If the answer is, "you can't," then what do you do about assessing progress in relation to those particular competencies?

### Instruments

1. The evaluation instrument used for the practicum evaluation this year consisted of a list of competencies in three different areas: training, facilitation, and cultural/spiritual. For each competency item there was a rating scale. The evaluator was to rate the trainee on each item and make notes as appropriate. Some of the competencies as they were written were so confusing that they could be interpreted in a number of different ways. If each trainee evaluator did this differently, then the results could not be compared and/or contrasted with other trainees. If testing trainees relative to competencies is the primary focus of practicum evaluation, this could better be done by testing trainees in the training workshops. The instrument used in the evaluation was somewhat impractical and was limited in what it was capable of doing. It appeared to have been used in excess of its capacity. Answers to questions and the obtaining of certain kinds of information can only be accomplished by asking the right kinds of questions in the right kinds of ways (ie. designing and using appropriate instruments).

2. There may be many different purposes for conducting practicum evaluations: To provide feedback to the trainees as to their own growth and development as trainers, as a measure or test of progress and accomplishment of specific program objectives, as course



completion or graduation requirements, as feedback to employers/sponsors vis a vis what trainees have accomplished during their time in training, or as a source of information to the funders of the program. The selection of one or more of these multiple purposes dictates a change in the approach and conduct of the evaluation and certainly a change in the instruments themselves. A number of different instruments could be developed for the different parties to the evaluation: One for the participant in the workshop, one for the evaluator (one of the NTD trainers), one for the employer/sponsor, one for peer evaluation, and one for self-evaluation. Because each instrument is different, the information they can provide differs substantially.

### **Stakeholders**

1. As an aid in the education process, employers could observe their own employee during one of the practicums to get an idea of their employee's training capabilities. By involving stakeholders in the program, ownership and commitment to the NTD program would be achieved.
2. There may be other interested parties to the evaluation results. Thought should be given about who will be allowed access to this information.

### **Scheduling**

1. There were many scheduling conflicts for the second practicum, primarily due to time constraints of trainees and budget limitations for NTD staff. There was little time between the end of the last training session and graduation exercises. For next year, if the first practicums are scheduled during training and the second ones away, the time, location, and the topic for the workshop should be identified in conjunction with NTD, the trainee and the employer, at the beginning of the year so that any potential conflicts can be resolved early. Advance planning would help eliminate anxiety caused by last minute arrangements and would provide a goal and a focus for trainees to work toward. It would also help

eliminate trainees' excuses of inability to arrange a time for the practicums. Scheduling of the second practicum evaluation created numerous problems. Scheduling the practicum in a group did not work and seemed to cause a lot of contention. Individual planning with each trainee, after they all understood generally what they were to do, would have been more effective.

2. The practicum evaluation should be set up to allow for reflective learning. The way some were arranged this year (immediately following the workshop) there was not enough time to reflect on the experience. Instead, some trainees were tired and drained as they went through an intensive review of the experience.

### Graduation

1. There was no clear policy on graduation. One of the conflicting messages that came through indicated that graduation depended solely on the completion of 120 hours of training by trainees. This was not the intent of the program. Rules for graduation must be developed and there should be a clear description and explanation given concerning them. It is not enough that trainees simply attend and complete 120 hours of training. There should be some sort of measurable criteria against which progress or a standard of achievement could be set. This could be determined in both a testing program during training and in the conduct of practicum evaluations. This would provide an answer to the question which must be asked, "How do we determine whether trainees have successfully completed the NTD training program?"

2. Graduation ceremonies were scheduled over two months after completion of the last training session. The schedule for next year will have the trainees at Nechi for their last training workshop at the same time that graduation ceremonies will be held. This is an effective way to reduce travel costs for trainees who want to attend graduation, and will act as an incentive for trainees to complete their training in time for graduation.

## Chapter 5

### TRAINING: OBSERVATIONS AND CONCLUSIONS

A major factor in the success of the NTD training program is the quality of staff. In excess of forty-eight years of combined training experience was present in staff who provided the training for the NTD program, and as one might expect, quality training was the norm.

In this first year of the three-year pilot project, two levels of training existed, one for the trainees and one (less obvious yet equally as important) for the trainers. For most of the trainers this was their first experience at designing and delivering a training of trainers program. Trainers were required to analyse training methods and techniques they have been using for years and then to organize them into learning modules with designs for their delivery. This meant describing what they do and justifying it to the satisfaction of a number of different audiences. This was a difficult task, especially considering there were less than four months available in which to research, design, and prepare the training program for delivery.

Complicating the problems associated with any "first" attempt was the expectation that the training staff do it right. Part of the informal set up and design of the program is the inescapable reality that trainers are role models. Trainees observed trainers doing what they themselves would soon be doing as trainers, their mannerisms, idiosyncrasies, styles, and inconsistencies. Because of the program being new and the unspoken feelings of trainees that somehow everything would be perfect, an unrealistic but understandable expectation was placed on trainers and the program. Most of the observations and conclusions presented here reflect this dichotomy. Strengths of the program and problems in the areas of materials, resources, and facilities; preparation for training; presentation and

delivery; instructions and terminology; discipline and control; and role of a trainer are presented.

### **Materials/Resources/Facilities**

1. The atmosphere at Nechi Institute is unique, created in part by the physical surroundings and by the tradition and mystique of Nechi Training. In keeping with Native tradition, training was conducted in a circle for most of the training sessions. The circle seemed to foster an atmosphere of closeness which, given the background of trainees, is essential if meaningful learning is to take place. Trainees need to feel comfortable enough so they will participate. During those training sessions when the main training room was not available, there seemed to be a difference in the attitudes of trainees and trainers alike. It appeared as though everyone's concentration levels waned when training was conducted in the Board Room.

2. Some of the materials used in the presentations were confusing and contained errors. Trainers should carefully review all materials and handouts to ensure that they are accurate, clearly written, and well organized before handing them out. Handouts of the material covered in class, if given at the beginning of each class, will assist trainees so that, "All the time available can be spent on learning" (Bhola, 1985, p. 49).

### **Preparation for Training**

1. Frequent changes made by trainers contributed to a feeling expressed by trainees that there appeared to be uncertainty in the planning and design of the workshops. Most of these changes were justified and were borne out by hindsight, but a look at the training program in its entirety would be beneficial, including a look at the individual parts, the flow, the sequencing, the activities, the material etc. A suggested audience might include select Nechi or Poundmaker staff as well as NTD staff and the Evaluator.

2. The quality of the training provided appeared to be related to the expertise and understanding which a trainer possessed of the content of a particular lesson. In those instances where trainers (for whatever reason) attempted to train in areas with which they were unfamiliar they were less successful. Trainers should be utilized in a manner that takes full advantage of their particular skills and abilities, including areas of expertise or interest.

### Presentation/Delivery

1. The presentation methods and techniques used in training could be reviewed. Although the ones used were appropriate, there was overreliance on some and underuse of others. Small group activities seemed to be overused. Trainees stated, that often too much time was given to complete these small group exercises, and that some of the exercises could have been finished more quickly by trainees working on their own. In the large group, those trainees who were not as outgoing or as sure of themselves easily got lost and lacked the confidence to speak up. In fact, a trainee stated she felt there was no recourse or help when she did get lost. That she, and probably others, felt this way, whether it was completely accurate or not, indicates a need to improve in this area. The use of the video recorder for trainee presentations was effective. There may very well be other activities in which the use of video equipment could replace or augment the delivery of training.

2. Different training styles and approaches were used by trainers in the workshops. In as much as trainees have different learning styles and needs the use of different approaches is not only desirable but important. Having knowledge of trainees' learning styles prior to inception of the training program would give trainers time to take these differences into consideration for planning and delivery. Use of a learning style instrument will, "provide a better match between how a person best gains knowledge and the methods used to impart that knowledge" (Sewell, 1986, p. 126). However, there was enough

variation in the approaches used by trainers that almost everyone was able to experience at least one type that was suited to them, if only briefly. )

3. Common understandings and usage of concepts, terminology, and procedures are necessary for the trainers as a group. One instructor explained an idea, then gave an assignment to trainees in small groups and asked other trainers to assist the groups. One trainee had the experience of one trainer praising her design for a particular exercise while fellow trainees in a small group and another trainer tore it apart. This can be very frustrating!

4. "Successful people visualize first how they will do something so that when they actually do it, it's like they've done it before." One trainee indicated that the instructions and information presented in class lacked clarity. They viewed themselves as visual learners and felt that the methods used did not fit their learning style. "Confucius say, I hear - I forget; I see - I remember; I do - I understand." These comments, provided by training staff, point to two areas that warrant attention. Firstly, trainees did not receive a detailed overview of the whole training program before they commenced training. The second area concerns the enhancement and improvement of learning for trainees by trainers as they apply principles of adult learning theory in training. Appropriately, much of what was learned in the program was experiential (I do - I understand). However, training could be improved by using techniques such as repetition, advance organizers, monitoring attention spans, etc.

5. On a couple of occasions, time became a problem factor in training. Trainers sometimes were not aware of the passage of time or were at least indifferent to it. One of the problems with not following a timetable is the danger of not being able to adequately cover all of the remaining material. Trainers occasionally slowed things down by trying to achieve a consensus on everything by both trainers and trainees. A lot of time was consumed by this small (and large) group grappling.

In some presentations, there was too much information presented in too little time. Time also became a factor in assignment completion. Trainees complained that they had worked hard to finish an assignment or exercise within the allotted time only to observe that other trainees had not completed their assignment, often because they had not worked as hard, or got sidetracked without the proper supervision. Additional time would then be provided to complete the assignment. This only frustrated those trainees who were diligent workers and had tried to finish on time.

6. Trainers sometimes lean on hunches or gut reaction to guide them in the delivery of training, consequently they have difficulty getting the group to understand what it is that they do. However, this approach is a good example of the adjustments trainees will be expected to make in their own workshops.

7. Some concepts are difficult to grasp. An effort made to ensure that presentations are clear and simple would avoid creating additional confusion.

8. Trainees requested that trainers make themselves available to trainees during and after class to help them with any questions they might have.

### **Instructions/Terminology**

1. In attempting to explain certain concepts and ideas, trainers were not always successful in keeping the focus of the conversation on the same level, ie., moving between different levels; operational, theoretical, practical, ethical, social, etc. This movement between the various levels tended to confound the discussion and often led to the expression of frustrations (related and unrelated to the topic under discussion) and to misunderstandings on the part of trainees.

2. Often it seemed as though trainees understood clearly instructions given to them but they lost it when they got up from their chair to go do it. One of the trainers stated, "As long as they are connected with the chair, everything is okay but once they disconnect from

the chair it is like pulling the plug -- on goes a blank screen in their eyes." Instructions given by trainers should be not only clear but complete, augmented by written instructions.

3. Trainers would occasionally give instructions to trainees, or undertake to do something and then not follow through with it. A case in point were the assignments made to trainees to read certain sections of the book. No attempt was made to determine if the assignments were completed. If it is worth assigning, then it should also be tied into the lesson and used as a frame of reference for further discussion or action.

4. Some training sessions were focused on a terminology/definitional approach to training. A number of trainees got lost in the terminology (eg. goals and objectives). Perhaps focusing on the process of writing goals and objectives as a sequential one would have been easier for trainees to grasp.

### Discipline/Control

A number of issues arose during the course of the training program in regards to discipline. Some of the more problematic ones concerned understanding and enforcement of groundrules for trainees. (The rules appeared to have been taken from some other program and superimposed on the NTD program.) The enforcement of the rules lacked consistency. A majority of trainees attending the training program came from backgrounds which were causing considerable turmoil in their lives. Alcoholism was a dominant theme, personally and in the family environment in which they were raised. Physical and sexual abuse, poverty, and prejudicial treatment at the hands of others were some of the problems trainees had experienced. Perhaps because of these factors, trainee's needs for consistent application of groundrules and for proper role models were intensified.

1. Inconsistencies in the application of rules were immediately noticed and often emotionally reacted to by trainees. Discipline that was meted out to individuals unfairly provided a focal point for the inner turmoil and frustration that they felt. When these feelings were allowed to fester, the results were interruptions in training. Two trainees



chose not to attend the last training workshop (five days in duration). Indications were given by NTD staff that these two individuals would be given the opportunity to finish the program. In an earlier workshop, one trainee was absent for three days without permission and was summarily ejected from the program with no possibility of completing the course. Consistency is essential in a program the calibre of the NTD. Staff should do all they can to remove any external sources of frustration like those experienced this year in relation to the stating, application, and enforcement of groundrules for trainees. ○

2. Trainers had to deal with a number of difficult, confrontational issues during training. Some were handled very well, others were not. Often trainers attempted to solve issues in the room. In those instances where it is evident that a decision or resolution need not take place at the time, why run the risk of opening up a potentially explosive issue when it's resolution away from the training session -- by the trainers -- may suffice? If the issue must be dealt with immediately, some control should be evidenced by the trainers over the situation so that in the case of a blow-up, trainers will be prepared to take charge if necessary. One discipline situation was turned into a positive learning experience by the trainer which, in turn, provided an experiential, reflective learning opportunity for trainees. The method used involved two stages. First, he dealt with the issue -- in the training session where it occurred -- as an example of problems trainees may encounter in their own work. He got participants to deal with it in the abstract, and try to depersonalize the confrontation. He demonstrated how to approach the problem, how to analyse and determine what is really the problem, and then asked for, or offered, suggestions as possible solutions. Secondly, wherever possible, he dealt with the resolution of the actual issue outside the training room. This meant that a certain amount of time would pass which would allow the emotional edge of the issue to abate somewhat.

In cases involving individuals the issue should then be dealt with one on one; if a small number of trainees are involved, then in a small group or one on one as appropriate. The purpose of this is to focus on the issue at hand with the individual, thereby not

encouraging or allowing the intrusion of distracting issues and feelings that other trainees may have. Discipline, especially involving an individual, should not be conducted in front of the whole group. This practice is unfair not only to the individual being disciplined, but also to other trainees in the group who may become embroiled in the issue emotionally.

It could be reinforced to trainees that the problems experienced in the NTD program are typical of encounters they can expect in their own training sessions.

3. There was a reasonable expectation that trainees would have and exhibit a greater degree of self-control over their behaviour in relation to groundrules and to their personal conduct away from training, than what was experienced. In the final instance, questions over groundrules and exercise of discipline must remain under the control of trainers.

However, the onus should be on trainees to act as professionals in relation to questions of conduct and discipline. The intensity of the moment or the way in which one feels should not be used to excuse rude, unacceptable behaviour of trainees to others.

4. Trainers occasionally sent confusing signals to trainees. Some trainers would exhibit real caring and concern for trainees while others in the same set of circumstances would not. Trainers would sometimes vacillate on issues, often not in a blatant, but nonetheless noticeable fashion.

### Relationships/Roles

1. Training staff treated trainees as equals in many ways. On a number of occasions, trainers were open enough to accept innovative and creative suggestions for change in their design for a particular lesson. Another example occurred in the second workshop where trainees were given responsibility for designing and conducting opening exercises. Trainers soliciting of input on a number of different items was welcomed by trainees and afforded them the chance to participate in decisions that affected them. This is certainly an appropriate and effective method of encouraging the formation of a strong learning community. However, there were times when this procedure did not facilitate the

task at hand, rather it tended to extend the amount of time required to resolve an issue or to make a decision when it was not particularly important that everyone have input.

2. The roles of the various NTD trainers were not completely understood prior to the commencement of training. There was an evolution of sorts into a role that for the most part was acceptable to trainees. Some trainees expected trainers to act as counselors to the trainees. Trainers on the one hand stated that they did not want to become counselors; that it was not their role. However, they confused trainees by slipping in and out of this role, sending out messages that contradicted their stated position on the issue. This is not an easy dilemma to resolve. Heartfelt concern and interest in trainees is a normal and important attribute of a trainer.

3. In the afternoon session where the video taped presentations were played back, a problem arose. One trainee's presentation was played several times as an example of a certain type of problem. As it was replayed, he became the object of much laughter and some derision resulting in the trainee experiencing and venting frustration and anger over the manner in which this was handled. Things were further complicated when other trainees and the trainer became embroiled in the discussion. Trainers cannot allow or encourage any action or activity which brings into question the ability or skill of a trainee or allow a trainee to be exposed to ridicule or derision.

4. Trainers must be circumspect in their conduct (appropriate role models) so they do not become the inadvertent cause of hurt feelings. One of the specific concerns in this regard was the feeling of some trainees that trainers were talking to other trainees about them behind their backs. Also, some trainers made comments that were not intended as insults but were interpreted as such by trainees.

5. The use of role play as an exercise one afternoon allowed trainees to deal with some issues that had been raised in the training program in a humorous but forthright manner. Trainees were able to explore their feelings and internalize their learnings through this exercise. Some of the trainees thought that this would give the trainers a message in a

clear but acceptable manner. The training staff, although they appreciated the humor, did not completely understand or accept the message. Here is an example of a reversal in the relationship between trainers and trainees. The message is: both can learn and teach; both should accept this.

6. Trainers on occasion accentuated and helped to perpetuate negative stereotypes. This was done in relationship to teachers in contrast with trainers when school teachers were held up for ridicule and derision as examples of what a poor trainer would be like. With the concern expressed in training about negative stereotyping and prejudice directed towards Native people, trainers must be aware that they act as role models for trainees. Prejudice, "Violates the basic principle of respect for all living things" (The Four Worlds Development Project, Adult Education Series, Discussion Paper Four, 1984, p. 3).

7. NTD trainers could hold an interview with each trainee as a means of personalizing the program and establishing a one-on-one relationship with the trainees.

## Chapter 6

### PROJECT SUMMARY

On June 25, 1988, the NTD class of 1988 graduated, bringing to a close the first year of this three-year pilot project. Much has been accomplished since the project's inception; much has transpired since the first trainee entered the doors of Nechi. Graduation also marked the end of data gathering for purposes of this report.

As a final overview and summary of the major evaluative findings, this chapter describes the strengths of the project, changes that have been implemented, and finally, future directions. The section on future directions has been organized in reference to the four major goals of the NTD project (see Appendix A). The major issues for each goal are identified and prioritized.

### Project Strengths

NTD training staff provided quality training and were willing and able to adapt and adjust the program as required. A nurturing atmosphere, created in part by the caring nature of all who work there, the peaceful country setting, and the circular workshop and ceremonial rooms, was enjoyably experienced by all involved. The trainees, through their training experiences (social, cognitive, personal, and professional) have developed a common hope and vision with a closeness of strength and unity that will extend into the future. All of these factors are the result of a program (that was developed in response to what has turned out to be an accurate assessment of need) designed by and for Native people.

It was evident that a community had been created as a result of this first year's training activities. A community of not only learners (both trainees and trainers), but co-workers and committed change agents, each with their own separate role inside a larger vision and dream for their people and their communities. The collective force from the

strength of the circle formed during the training program will spread and eventually extend across this country to permeate communities and organizations, with the potential to have significant impact. This impact will expand and extend far into the future as subsequent classes graduate and join the larger community of trainers.

In summary, the strengths of the project are:

1. Commitment and dedication of NTD management and staff to making the project work
2. Willingness and capability of NTD management and staff to adjust and adapt the program
3. Provision of professional calibre training by highly-qualified trainers
4. Creation of a community of learners, co-workers, and change agents (trainees and trainers)
5. The meeting of a real need that has already impacted Native communities and organizations in significant ways
6. Growth in unity and closeness of trainees combined with a commitment and dedication to becoming trainers; and their willingness to help better the program
7. Acceptance and encouragement by management of two types of training; one for the trainees and one for the trainers
8. Development of a positive and cooperative relationship between NTD management and staff and the Evaluator
9. Heightening of the special atmosphere at Nechi by caring, concerned staff and management
10. Development and use of the filing system created by Jon Sagen

### Changes Made

One of the most satisfying aspects of this evaluation project for the Evaluator has been to provide information which impacted on the project. Management, for their part,

have used this information and their own good judgements to make changes and adjustments to the program as it developed. The following, important changes have already been made in the project:

1. A review, resulting in a substantial revision of the original contract with Employment and Immigration Canada, has been completed
2. Management has clarified staff roles and made specific assignments to staff, covering all parts of the project
3. Recognition of the need for and the implementation of changes to the Training Program and its delivery have been noted
4. Management has undertaken a careful review of the whole project and is committed to making the necessary changes to ensure a successful outcome

### **Future Directions**

This section identifies those changes which need to be made so that the project may reach its goals and objectives. The goals referred to are those contained in the contract with Employment and Immigration Canada (see Appendix B). Under each of these goals, items which require attention are listed.

#### Goal number 1

"To develop and pilot test a model system of training Native people for professional roles as trainers."

#### Items

1. Continue to provide for staff needs (personal and professional), and for the quality of their work environment and relationships
2. Continue to refine and complete a Model Training Program and a system of delivery for the training program by:
  - (a) developing and using a consistent format for the training manuals for trainees and trainers -- and completing a working draft this year

- (b) developing and using trainee assessment and feedback procedures during training
  - (c) resolving problems associated with practicums (scheduling, format, and evaluation)
  - (d) identifying and making use of new materials and resources
  - (e) reviewing the schedule and sequencing of the training program
  - (f) conducting a needs assessment of future trainees (cognitive, personal, social, and professional)
  - (g) developing policies covering graduation and ground rules for trainees
3. Continue to refine and complete a Model system of delivery by:
- (a) trainers being better prepared
  - (b) considering the use of alternative methods and techniques for delivery of the training program
  - (c) being consistent in following policies
  - (d) establishing agreement over the role of trainer
  - (e) becoming aware of and limiting obstacles to trainee growth

Goal number two:

"To develop and pilot test a model system of recruitment, role identification, support and placement services to Native people in permanent training positions."

Items

1. Undertake to plan, develop, and describe a Model system of job identification this year
2. Establish relationships with employers/sponsors and assess their expectations of the NTD program
3. Provide support for an ongoing relationship with trainees, including the offering of continuing, professional development workshops along with the establishment of a network for trainees



#### 4. Continue to improve upon (and describe) the system of recruitment

##### Goal number three:

"To place 45-50 Native Canadians in permanent professional training roles by January 1, 1990."

##### Item

1. Plan and implement a strategy for the placement of Native Canadians in training positions this year, including the acceptance by all parties of a definition of placement and an elaboration of specific tasks to meet this goal

##### Goal number four:

"To involve a recognized independent Native training organization in providing critical, previously unaddressed, services which directly impact employment of potentially significant numbers of professional Native people."

##### Item

1. Continue this work

##### Other Items

1. Review and plan the evaluation activities for the coming year with the Evaluator
2. Review the new contract with Employment and Immigration Canada

### **Conclusion**

The development to date of the NTD project has been successful, but is incomplete. Incorporation of those changes deemed necessary (by project management), will move the project that much closer to successful completion. The result will be a Model program, transferable and replicable, that will impact the labor market in an innovative way.

There has actually been more than one evaluation take place in this project. All staff have been involved to some degree in this process. More importantly, both staff and management will continue to be involved in taking information and using it for fine tuning and adjustment purposes. Patton (1984, p. 12) makes some useful comments that may

help NTD personnel to better use evaluation information, whether their own or that of the Evaluator, to change the project.

1. You can improve your ability to move (and use) information through the system with practice.
2. It takes time and effort to move information through the system. While time and effort can be reduced with practice/experience, time cannot be reduced to zero.
3. As information moves through a system it will wind around different parts of the system. Information use is not a linear process.
4. Different people will receive and send (information) . . . in different ways. . . . Passing information through the system can be painful. It will be received and passed on in different ways because people in the system are different.
5. Moving information through the system can be and should be fun.

If the necessary changes are made, keeping in mind Patton's points, this project will contribute significantly and importantly to the labor market and to Native society.

In the last decade or so Indian people across the countries of Canada and the United States have been experiencing what might be called a revitalization. We have awakened just in time to re-discover something that might otherwise have passed from our memory and from our reality forever. I am referring to our great heritage our culture, and our values. Fortunately, we woke up in time. But when you wake up, the long day just begins, so we still have a long way ahead of us and a lot of work to do now that we have awakened.

Tom Porter (Mohawk)

## Chapter 7

### EVALUATING THIS PROJECT: OBSERVATIONS AND REFLECTIONS

This chapter provides a reflective review of the evaluation proposal and the subsequent conduct of the evaluation, along with relevant observations and conclusions. The actual conduct of the evaluation differed somewhat in both theory and practise from what was proposed. These differences produced some interesting findings. In lieu of a chapter describing traditional research design, I have elected to discuss the evaluation process and procedures from a grounded theory perspective. This approach allows for the identification and discussion of the theory and rationale of evaluation after the experience of evaluation. The author chose this format for the chapter because it logically duplicated the experience of this study, and provided several useful insights.

The first section describes the background of the evaluation, the second section deals with some of the differences between my original evaluation proposal and what actually occurred, and finally, the third section describes a number of observations and conclusions arising from this evaluation.

#### Background of the Evaluation

Two months after his sister Marilyn moved next door to us. I watched Pat drive to Marilyn's house one day and decided it was about time to introduce myself to our new neighbour. I soon discovered that Pat did not live there but was just visiting his sister. It was interesting to learn they both worked at Poundmaker/Nechi where Pat was the executive director of Poundmaker Lodge and Marilyn was the Training Coordinator for Nechi Institute. The setting and location of Poundmaker/Nechi had so intrigued me over the years in my infrequent drives by it, that I immediately solicited an invitation to visit with them and to tour the facility.

During this same period of time, I read in a local newspaper an interview with Maggie Hodgson, Executive Director of Nechi Institute, regarding a new project they had just received funding for; a training of trainers program for Native people. I had recently finished my classes at the University of Alberta and was looking for work, preferably an evaluation project, which would not only generate some sorely needed revenue but also meet the requirements for my thesis. As I visited at Poundmaker/Nechi I asked Marilyn about their new training of trainers project. Shortly after we started talking, Marilyn received a phone call informing her that Mark Amy had been in a tragic automobile accident. As I offered my condolences and prepared to leave, Marilyn explained that Mark was to have been the Coordinator of the Native Trainers Development Project. Marilyn offered to meet me at another time and to arrange an interview with Maggie regarding the evaluation portion of the NTD project.

A couple of weeks passed without any word from Marilyn regarding a possible meeting with Maggie. During this time my wife, Lori, and I had become friends with Marilyn and I offered to help her look after her yard.

Some time after the Memorial service for Mark Amy was held, Marilyn phoned and I was invited to Nechi for what I thought was to be a meeting with Maggie. Marilyn greeted me shortly after I arrived and as she accompanied me to the conference room she informed me that at Nechi, interviews were often conducted by a number of staff members at the same time. Now, I had thought that the purpose of this meeting was to meet Maggie and to gather more information about NTD. I was certainly not prepared for what ensued! I walked into the room and was greeted by no less than seven Nechi staff members. To set the record straight, they were all in a meeting discussing other business when I arrived and had decided to stay on to have a little sport with me -- evaluate the evaluator -- (at least that's how it appeared to me). Not only is it somewhat unnerving to be thrust into a room and to be interviewed by that number of virtual strangers, but the nature and tone of the interview was equally unexpected.

A delightful repartee developed between us, and I was soon made to feel comfortable and relaxed. Questions were asked regarding my background (I had been asked to bring along a resume), my astrological sign, my philosophy of evaluation (try that one on for size) and, with a brief explanation of the NTD project, my method of evaluating certain aspects of the project. As the discussion wandered through these and other topics, it was brought to my attention (perhaps in jest, although I think not) that one of the reasons I was being interviewed relative to the evaluation component of the NTD was because of the kindness I had shown Marilyn in helping her with her yard. The meeting lasted for over three-quarters of an hour at the end of which I was asked to submit a proposal to conduct the evaluation of the three-year NTD project. A week or two after I submitted my proposal to conduct the evaluation of the NTD project, I received a call from Butch Wolfleg informing me that I had been chosen as the evaluator.

I mention the meeting I had, and the feelings I experienced, because it is a good example of the caring nature of the people who were to be involved in the project, and of the unique atmosphere created at Nechi. This encounter turned out to be a harbinger of what I experienced in the following. I conducted the evaluation of the NTD project.

### **Evaluation: Proposal/Actual**

In writing the evaluation proposal for the NTD project, I relied on information contained in the proposal (see appendix A) submitted to Innovations Program, Manpower and Employment, by Nechi Institute in October of 1986. It is not always an easy task to develop a proposal to conduct an evaluation. Language is often an inexact method of conveying information, thoughts, ideas, and feelings, and yet that is often all we have to rely on as a data source. Also, problems surface when we attempt to design based on our own interpretation of a project. In retrospect, the information contained in the proposal did not accurately or completely delineate the project as it was intended or as it actually unfolded. This is not an unusual turn of events in the life of most projects and as projects

change, so must the evaluation. In this evaluation, "The initial plan for evaluation . . . (was) just a starting point" (Alkin, 1979, p. 257). Caudle (1985, p.4) suggests that "a continuous evaluation technique is needed to match . . . program changes." The changes in the project, of course, had an impact on the development, and "evolving rather than fixed" conduct of the evaluation (Eash, 1985, p. 10). The nature of this three-year pilot project, called for, and in fact encouraged, the use of a formative evaluation approach which encourages adaptation and flexibility in many aspects of an evaluation.

The evaluation proposal (see Appendix C) is used as a basis for comments on the actual process and procedures used and their rationale. This juxtaposition provides a unique view of the evolution of this evaluation study from the writing of the proposal, through the actual conduct of the evaluation, to the final report.

### Basic Aims

In relationship to the three basic aims stated in the evaluation proposal, the following comments are offered:

1. The task of measurement and testing of trainees relative to the training program (item 1 of the proposal) rightly belongs to NTD program staff. This task is one that should not have been included in the proposal as part of the Evaluator's job in the first place. One of the components of a self-sufficient training of trainers curriculum is a set of procedures used by the training staff to assess trainee's growth in relation to skills, knowledge, and perhaps attitudes, gained from the program.

2. The inclusion of the task of gauging trainees' performances on the job in actual working situations, after the training, is an example of a poorly conceived plan. This, of course, could not be done by the Evaluator within the constraints of time and budget in the contract. The task, as it is written, is one that the employer may want to do. Perhaps, the employer would then be willing to share this information with NTD staff. In the second year, the Evaluator, in cooperation with the employer, would like to attempt to assess just

what impact or effect the trainees have had in their organizations. This information would be used to help adjust the training program and to aid in future placement and support activities.

3. The intent to provide feedback to staff (item 2 of proposal) and feedback to policy makers and planners (item 3 of proposal) was well founded, and in its implementation, quite important. It was Patton (1984, p. 3) who said, "The challenge is not really producing information . . . but rather getting people to use information." It has been gratifying to the Evaluator to see his information used. The Project Coordinator stated that the biggest benefit of having an evaluator around all the time and providing ongoing feedback was that it made him think about the project more (see Patton, 1985, p. 10).

### **Evaluation Design**

A formative evaluation of the project was deemed most suitable by project management and the Evaluator "instead of a fixed design set in advance" (Eash, 1985, p. 250; see also Cohen, 1982, p. 13). They viewed ongoing (as opposed to summary) evaluative input as a necessary ingredient for fine tuning the project and ensuring its success. Marshall and Peters (1985, p. 273) interestingly describe evaluation as a "systematic community learning process for the collaborative review, improvement and development of policies, programmes and practices." This collaboration between project personnel and the Evaluator, offered an unusual opportunity to pool ideas, viewpoints, and expertise. The collaboration enriched the evaluation and consequently the project itself. Working from a qualitative paradigm, the position occupied by the Evaluator in this project was one of participant observer. The Evaluator attended over ninety percent of the training sessions to allow both trainees and NTD staff to become comfortable with him, and to provide the Evaluator with a complete view of the program. In so doing, it was hoped the data gathered would be more accurate and usable (Nagel, 1982). The determination of

directions for the evaluation consisted of identifying areas of focus in the project and then evaluating them.

### Data Collection

1. The primary means of collecting data were interviews (including "retrospective" interviews, Alkin, 1979, p. 35), document collection (including journals), participant observation, and questionnaires. Interviews were conducted with all NTD staff and trainees, and the Innovations Officer from Employment and Immigration Canada. All pertinent documents were gathered and analyzed. The Evaluator attended many staff meetings (planning, design, management), met individually with all NTD staff on numerous occasions, and attended over ninety percent of the training sessions. These "multiple sources of data" were accessed so that the Evaluator would feel "adequately equipped" to answer the tasks of the evaluation (McLemore and Neumann, 1987, p. 88).

1. An interview protocol for trainees was developed and tested. The Evaluator found it was not an effective instrument to direct the interview but was used instead to categorize and record data. The Evaluator felt that a more informal, unstructured interview was more appropriate to the circumstance than a formal interview using the questions developed for the interview protocol.

2. Another method used by the Evaluator to collect data was asking trainees to keep a record (journal) of their experiences and feelings about the program. These were turned in to the Evaluator at different times throughout the workshops. This turned out to be a valuable source of data. On a number of different occasions, information contained in these reports led the Evaluator to investigate new, previously unthought-of ideas, problems, and issues. Many of the trainees followed through with this even though it required an extra effort and took time away from their busy schedules. Trainees were also asked to keep a record between training workshops. A fewer number of the trainees completed this task. If there were a way to get trainees to keep and submit this record after



completion of the program, this could provide a source of ongoing information that would probably be very useful to the program. If the program does exist in the field with the trainees when they graduate, then what better sources to tap for data to feed back into next year's program, and the one the year after.

3. Data gathering sometimes presents problems. One interview or questionnaire is not too demanding, but when the evaluator requests journals, interviews, questionnaires and other forms of input that require an excessive amount of time, people are more reluctant to comply. In one study, respondents to questionnaires felt so overwhelmed with requests for information that one of them stated, "I was afraid to go to the washroom for fear that I would find more forms to fill out on the roll of paper" (Sillito 1988, p. 11). A balance must be found between the needs of the evaluator for information and the ability or willingness of respondents to provide it.

### **Cultural Acclimatization**

Culturally speaking, this project took the evaluator outside his realm of experience. Almost every aspect of the project was influenced, to some degree, by Native culture. Nechi, itself, has had a great deal of influence on the program. Also, the trainers and trainees bring their own particular cultural influence to the program. With almost no experience working in, being around, or observing Native culture, the Evaluator was faced with the responsibility of gaining a measure of understanding of the culture, while at the same time conducting an evaluation within this cultural context. A number of observations are made on this issue:

1. A certain amount of time and first-hand experience is necessary for this acclimatization and understanding to occur. No two individuals will take the same amount of time nor will they ever arrive at the same place. In this instance, the time required was significantly longer than was anticipated. A more intensive involvement with the trainees and the trainers (social interactions, casual and intense conversations) has helped the

Evaluator to know the people better and to gain their confidence and trust. This in turn has helped the evaluator to view the whole project in a cultural context.

2. The amount of acclimatization and understanding that are required for an evaluator to do the job adequately is unknown. More than double the amount of contracted time that was spent by the Evaluator in conducting the first year evaluation. Most of the extra time was profitably spent as part of the acclimatization process.

### Data Analysis

Time brings a perspective to things unseen in the present. Data analysis if done on the spot sometimes yields different results than analysis that takes place after a time lapse. Because some data cannot always be easily understood on first or even second glance, the allowance of a gestation period offers the advantage of more time for consideration of the data. Data analysis, without complete information and the perspective that time can bring, may lead to erroneous conclusions. For example, in the training workshop held in April, my early impressions (based on one or two days of observation) were that the design and focus for the workshop were seriously off target. I wrote at the time that I needed to be patient, to watch and observe for the remainder of the workshop before I completed my analysis and arrived at a conclusion which, incidentally, differed significantly from my original impression. This whole issue of prejudging a program without the perspective that time and experience will bring could be explored further.

1. It is important for the evaluator to understand and appreciate the level on which a program will operate and the level (intellectual) of participants as they come to the program. Without this perspective the program may be unfairly judged in light of other programs or experiences that the evaluator has observed. What appears on the surface to be a very elementary program in relation to other programs may turn out to be quite advanced in terms of the clientele it will serve.

2. Two factors that must be considered in relationship to data gathering is that of time and financial constraints built into the project. The extent to which evaluators can go to gain a complete understanding of the evaluand is dictated by time and funds available.

### Evaluation Process

Instead of using a conceptual framework to analyze the training and placement systems, the information that was gathered was organized into themes or categories as a more realistic approach given the unsettled nature of the program in the first year. Too often, we as evaluators find and use some convenient model or approach (as was suggested in this proposal) which does not fit the task at hand. Not that there is anything wrong with the various models available to us, but, "Evaluation implemented concurrently with development requires flexible models that are adaptive to the dynamic environment of an emergent program" (Edwards, 1987, p. 27).

1. There is a problem in evaluating solely by objectives. In concentrating on the objectives, an evaluator may miss potentially important unintended outcomes. In fact, some have suggested that "the unanticipated consequences of program actions may be as important as the intended and anticipated" (Bhola, 1982, p. 100). A program is a synthesis of many factors and the result is a synergism, not a sum. It requires more than just a look at certain select variables, especially in a program where the goals and objectives are not yet clearly fixed, as in this project (Patton, 1984, p. 10). The program goals and activities for various sections of the NTD project were not clear. This made it difficult to evaluate the degree to which these have actually been achieved. There was some sense of where the project was going, but there was not enough detail or clarity of statement.

2. One advantage of using the qualitative paradigm in evaluation is that it can allow for intuitive changes. "The current practice of evaluation requires creativity, flexibility, situational responsiveness and sensitivity to ways of raising questions that are particularly salient in specific contexts" (Patton, 1984, p. 11). Flexibility is especially important in

evaluating developmental (pilot) projects, where a great deal of change may be expected over the life of the project (see McLemore and Neumann, 1987, p. 91-92). The use of intuitive ideas has proven effective as a guide in conducting this evaluation. Hindsight has helped to establish the validity of the changes sparked by intuition.

### Evaluation Tasks

In response to some of the specific items contained in the proposal, the following comments are given.

1. Two of the items (1 and 5, p. 2) in the evaluation proposal (development of a list and profile of employers/sponsors characteristics) could be undertaken in the second year if required.
2. All trainees were interviewed to gather their responses to the program (item 2, p. 2). The only demographic information gathered was their age and gender. For next year, information about the field in which first and second year trainees work will be gathered and collated. This information may prove useful in selection and recruitment activities.
3. Very little was done in the placement area of the project (items 3, 6, 9, p. 2). As recommended elsewhere in the report, this whole area needs to be discussed and addressed.
4. The materials used in this year's program were scrutinized and commented on. It was unnecessary to develop product evaluation techniques as described in the proposal (item 10, p. 4).
5. Items 12, 13, and 14 (p. 4) in the evaluation proposal need to be reviewed. As they are written they do not make much sense in terms of the project as it exists today. This issue should be discussed with NTD management. References should be made to the contract to attempt to clarify what was intended and adjust this to reflect the reality of the present situation.

## **Reporting**

From the proposal to the actual signing of a contract, the number of reports were reduced from six to three. In the following year it is the intent of the Evaluator to prepare and deliver a number of shorter reports, both verbal and written. Sometimes, "a conversation with the program director at mid year just might turn out to be the most important and influential information transmitted during the evaluation" (Alkin, 1979, p. 226; see also pp. 252-254). This is seen as a more useful approach to the Evaluator. It will make available to NTD management more immediate information which can be used in the development of the project. The reports will be simple and brief, providing information that the Evaluator feels is important or that has been specifically requested and agreed to. These reports will be collated and summarized into a final, year end report.

## **Contract**

The contract we signed for this project was a simple document that laid out the basic mutual obligations and commitments between NTD and the Evaluator. It differs significantly from the evaluation proposal document and from the project proposal document. The changes made were in part due to the Evaluator's desire to remove contractual restrictions which might have interfered with the needs of the project, specifically in relation to the formative evaluation component. Project management was willing and most accommodating in this regard. They too felt that the Evaluator must be free from unnecessarily binding contractual stipulations which might focus the evaluation in directions contrary to the changing needs and demands of the project.

A total of fifty days in each of the three years of the project were allocated under the terms of the contract for the evaluation component. Considerably more time was spent during the first year (much of this in becoming culturally acclimatized). It is the opinion of the Evaluator that more time (at least for the first year) should have been budgeted for the evaluation component of a project of this size. At present, the amount of time needed in the

second and third years cannot be determined. The focus for next year's evaluation will be different, suggesting that there may also be different needs in terms of time for the conduct of the evaluation.

### Payment Schedule

A problem over the payment of invoices for the evaluation services performed by the evaluator, at the request of one of the NTD staff members, resulted in a letter to the Project Coordinator detailing the following information.

1. The current evaluation payment schedule stipulates payments totaling \_\_\_\_\_ spread more or less evenly across a 12 month period. This method of payment seems to suggest that the Evaluator is either a salaried employee of the NTD project or is providing contract services for a set number of days each month over the life of the contract. Neither of these are accurate.
2. The evaluation component, required as part of the NTD project, is provided under contract by an outside evaluation consultant. The consultant, in meeting the needs of the evaluation component, must allocate blocks of time ranging from 1/2 a day up to 15 days at various times through the year. For example, in year one, approximately eighty percent of the allocated contract days will have been worked by the end of January, 1988.
3. It is customary for a consultant to invoice for services both during and after (and occasionally before) completion of segments of a project. As is the case in most businesses dependent upon a cash flow for their survival, a consultant depends upon payment of invoices for time spent on a contract as the only means of income during that period of time. Spreading the payments out over an extended period of time may put the consultant in an untenable financial situation.

4. In light of the above, I would appreciate exploring some mutually acceptable alternatives to the present schedule of payments.

A revised schedule of payments was subsequently agreed to and implemented with the cooperation of the comptroller.

### Role of the Evaluator

The role of an evaluator is best described as one who is engaged in observing, collecting, analyzing, organizing, and reporting data, and in "providing narrative accounts that provide vicarious experiences" (Stake, 1985, p. 244). As a step beyond these obvious functions, an evaluator can see or even experience "multiple realities" of those who are involved in a project (Lincoln and Guba, 1986, p. 75; and Lincoln, 1986, p. 4). The evaluator should be able to "move between groups . . . learning the value positions of each and in turn, teaching other groups about the various constructions of reality which are held" (Lincoln, 1986, p. 5). He or she can further communication by opening up and maintaining a dialogue between the various groups or individuals involved. In this way any detrimental effects of the multiple realities may be limited and positive ones shared. The result can be collaboration instead of confrontation or misunderstanding.

An interesting issue arose during the evaluation of the training program. The Evaluator assumed that NTD staff and trainees alike, would understand what the Evaluator's role was, and what he was expected to do. Unfortunately, this was not the case.

On the second day of the first training session the trainees, by their action, indicated that they thought that I was there to evaluate them and their progress in the program (misconceptions over the evaluator's role may have been held by some of staff as well). The trainees were asked to complete a short questionnaire. Some of the trainees were upset that they had filled their forms out earlier in the day, while others waited until later to complete them. During this interval of time, some information was discussed and posted

on newsprint that pertained to the questionnaire. Those that had completed the questionnaires early, without benefit of this information, were worried that their responses would not be as good as those that had the benefit of the discussion and could read the points written on the newsprint. They felt that the questionnaire was really a test and that they had been put at a definite disadvantage. They were worried that they had done poorly. As soon as the Evaluator recognized the problem, steps were taken to rectify it. In the end, one trainee reported that having an evaluator in the training room for most of the workshops was a positive experience. It seemed to help give a whole new understanding of the evaluation process.

In retrospect, the experience was a foreshadowing of what was to come. The sensitivity of trainees to evaluation was most acute. Trainees had a palpable fear and were worried over their upcoming evaluation in relation to their practicums. It seemed as though trainees were spending "a lot of time praying . . . praying an evaluation won't happen" (Patton, 1984, p. 1). This fear should have been a clue to the Evaluator of potential problems for trainers in their trainee evaluation endeavors. This information might have prevented some of the problems which occurred in the practicum evaluations. Evaluators can't afford misunderstandings regarding their role because:

Program evaluators are usually nice people trying to earn a relatively honest crust; but to some program developers and program participants, evaluators (even formative evaluators) are seen as an excuse for bringing in an exorcist. Evaluators protest that our role is to help to evaluate the program and not the individual. However some individuals identify with the program and they see us as a threat (Ball, 1982, p. 172).

1. People are very cautious and concerned when they must have anything to do with evaluation. In the interviews I conducted, I took the liberty of closing off the interview with some positive comments on their participation not only in the interview but also in the program. This served two purposes: One, to let people know that the things they do are recognized (people feel that an evaluator sees and observes everything, and they seem to



value any feedback as being important and was appreciated); and two, as a means of helping to establish and maintain a positive relationship with them because they are important sources of data (Guba and Lincoln, 1981). If the relationship is poor, they may not be willing to provide data, or they may feed false or incomplete information to the evaluator and make the job of sifting the data more difficult. This may also be true if the evaluator and individual data source are too close.

2. Some people have the idea that certain information may be intrinsically dangerous, and in fact, "Evaluative information can be both used and abused" (Bhola, 1982, p. 84). If individuals involved in the evaluation do not feel confidence in the evaluator as a professional or as a person, they may be reluctant to provide information, especially data they feel may adversely affect the project. It is my contention that accurate, relevant information, of whatever kind and from whatever source, if made available and used properly, can help the task at hand. Part of an evaluator's role is to build confidence in the evaluation process, but they can not provide "slick easy answers to slick easy questions" which are sometimes asked of them (Ball, 1982, p. 171).

3. During the course of the workshops, the Evaluator found himself slipping between three different roles: As an evaluator conducting an evaluation of the project; as a learner immersed in the concepts and ideas being presented; and as an evaluator evaluating the evaluation of the project (meta-evaluation). I found all three roles fascinating and useful. As a learner I could see the program from that perspective, and could identify problems from a learner's eyes. As a meta-evaluator I was able to detach myself somewhat from the conduct of the evaluation and observe its impact, its effect, and its deficiencies, and then make note of these. Both roles enhanced the primary one of program evaluator.

4. One trainee commented that the Evaluator was sensitive to the group and the culture. When the evaluator does not have any related experience, in this case working with or in a Native program, this "cross cultural sensitivity [which] involves a suspension of judgement" (Patton, 1984, p. 8), can be a useful way to compensate for the lack of

cultural understanding. Also, if the subject matter of the program being evaluated is new it takes time to really understand what is going on and what it all means, just as it does for the trainees. Next year this will not be the case because the Evaluator will be familiar with the content and context of the program.

### Evaluation Review and Planning for Next Year

Evaluators receive benefits from the experience of conducting evaluation studies. In this instance it was both professional and personal. Each new evaluation study produces new insights, engenders new ideas, brings into question beliefs or ideas previously held. On a personal level the time I spent in the training sessions taught me to be less judgmental, more accepting and understanding of myself and others. On a professional level there is no experience like experience. This is the first evaluation study completed by the Evaluator since finishing graduate studies. In retrospect, just as it was good to study evaluation research from an academic perspective at University after first having had a good experiential background in the field, it was good to get out into the field again after having completed the academic study. This mix seems to be one essential ingredient in the make-up of a good evaluator.

1. Based on information from this year's evaluation, some of the items under scrutiny will not need to be examined as closely or even at all. For example, the instructional aspects of the program need not be looked at as closely in the coming year. One of the strong points of a formative evaluation is the freedom it affords the evaluator to move the evaluation in whatever direction that is required or desired. The evaluation needs to focus on the specific placement goals and activities of the project. In addition, we need to assess employer/sponsor attitudes and expectations so that a better fit might be engineered between the two.

2. Another goal of the Evaluator would be to promote the idea that NTD staff should start to view this project in evaluation terms from their own perspective. This view of

evaluation as an integral part of the planning and implementation process is considered important by the Evaluator. The distance between good planners/developers and evaluators is less than might be thought. An effective planner/developer will constantly evaluate what he or she is doing: Why do this? What are the consequences of this action? What is the real purpose? Is this the best, most efficient method? Using this information will make their job easier and the results better.

3. The evaluator should take the time (this is for the benefit of the evaluator) to write/type out a summary of observations and ideas each day. The amount of information gathered in any one day would not require a lot of extra time to write up, and it would, if organized and planned in advance, make the writing of the final report more of a collation and summary process. This would also help to crystallize the thoughts of the evaluator into an initial response and then allow for later reflection. The other advantage would be to provide written feedback to NTD staff as they desire it, and would allow "sufficient lead time to digest the findings" (Patton, 1980, p. 187).

4. One area of observation in the training concerned the amount of time that was spent on certain activities (eg. Where are We's.). Nothing other than an informal attempt to keep track of the time spent on the activity was done by the Evaluator. In future, tracking of time would be recommended as a means of determining accurately the amount of time spent on a topic or activity within a program. This could then be used to help assess the worth of that activity in relationship to the amount of time actually spent on it.

5. Trainee graduates could be tracked for the remaining time of the NTD Project to determine:

- (a) what benefit they have been to their employer since their training
- (b) what skills they have gained from the program
- (c) what skills they still need
- (d) how their roles as trainers have evolved and what kinds of training (or other) functions they perform in their organization.

6. Trainees did not evaluate the workshops, the trainees, or the program as a whole in any formalized manner. As a consequence, NTD staff received very little direct feedback from the trainees. This was unfortunate because their input could have been valuable. For next year, trainees input in this way could replace some of the feedback that the Evaluator gave in the first year, allowing the evaluator time to spend in other areas of the program (eg. assessing employer/sponsor response to the program). Instruments could be developed for use by the trainee, and interviews could be scheduled with trainers if necessary.

### Conclusion

It has been my experience that a great deal depends on the ability of the evaluator to establish and maintain a good relationship with stakeholders. The evaluator must be respected and accepted by all the stakeholders to really be able to freely and completely access information. A good relationship will not cover up weaknesses nor subordinate the importance of quality work, but it will improve the climate within which the evaluation is conducted. With this type of relationship, it is more likely that any problems that arise surrounding the evaluation will have a better chance of being dealt with satisfactorily. It is also my impression, based on experiences with both ends of the relationship spectrum in an evaluation context, that results obtained out of a positive relationship are given more credence than those emanating from a dissatisfactory relationship. One other important consideration is that of future work. A positive, mutually rewarding relationship is more likely to be continued in the future. For whatever other reasons evaluators work, they also work to make a living.

One area for inquiry in evaluation research would be a study into the effect of an evaluator's personality on the type and quality of relationships that evaluators are able to establish. The degree to which these relationships affect utilization of evaluation findings would also be interesting and perhaps useful research.

## References

- Alkin, M. C., Daillak, R., & White, P. (1979). Using Evaluations: Does Evaluation Make a Difference? Beverly Hills: Sage.
- Ball, S. (1982). The Perils of Program Evaluation. Contemporary Evaluation Review, 1, 166-173.
- Bhola, H.S. (1982). Evaluating Development Training Programs: A Practical Manual for Trainers of Development Workers and Change Agents in the Third World. Bonn, West Germany: German Foundation for International Development.
- Bown, L. (1985, April). Current World Trends in Adult Education. Paper presented at the International Symposium on Adult Education, Haifa, Israel: Mount Carmel International Training Centre for Community Development.
- Caudle, S. L. (1985, October). Evaluation as a Process: The Formative Summative Continuum. Paper presented at the Joint Meeting of the Canadian Evaluation Society, Evaluation Network, and Evaluation Research Society, Toronto. (ERIC Documents Reproduction Services No. ED 267 085)
- Cohen, A. M. (1982, October). Program Evaluation: Why it is Seldom Perceived as a Success. Paper presented at the Joint Annual Meeting of the Evaluation Network and Evaluation Research Society, Baltimore, MD. (ERIC Documents Reproduction Services No. ED 263 369)
- Dillon, J. T. (1984). Finding the Question for Evaluation Research. (Paper and Report Series No. 102). Portland, OR: Northwest Regional Education Lab. (ERIC Documents Reproduction Services No. ED 259 011)
- Eash, M. J. (1985). A Reformulation of the Role of the Evaluator. Educational Evaluation and Policy Analysis, 7(3), 249-252.
- Edwards, P. K. (1987). Conceptual and Methodological Issues in Evaluating Emergent Programs. Evaluation and Program Planning, 10, 27-33.

- Guba, E. G., & Lincoln, Y. S. (1981). Effective Evaluation. San Francisco: Jossey-Bass.
- Hickcox, E. S. (1985). The Sea of Instructional Improvement. Teacher Education, 26, 18-24.
- Knafl, K. A., & Howard, M. J. (1984). Interpreting and Reporting Qualitative Research. Research in Nursing and Health, 7(1), 17-24.
- Lincoln, Y. S. (1986, February). Negotiating Politics in Organizational Cultures: Some Considerations for Effective Program Evaluation. Paper presented at the Annual Meeting of the Association for the Study of Higher Education, San Antonio, TX. (ERIC Documents Reproduction Services No. ED 268 893)
- Lincoln, Y. S., & Guba, E. G. (1986). But Is It Rigorous? Trustworthiness and Authenticity in Naturalistic Evaluation. New Directions for Program Evaluation, 30, 73-83.
- Marshall, J., & Peters, M. (1985, November). Evaluation and Education: the Ideal Learning Community. Policy Sciences 18(3), 263-288
- McDuff, N., & Long, J. S. (1985, November). Listening to Learners--A Key to Better Training. Paper presented at the National Adult Education Conference, Milwaukee, WI. (ERIC Document Reproduction Services No. ED 263 369)
- McLemore, J. R., & Neuman, J. E. (1987). The Inherently Political Nature of Program Evaluators and Evaluation Research. Evaluation and Program Planning, 10, 83-93.
- Nagel, S. S. (1982, October). Ethical Dilemmas in Policy/Program Evaluation. Paper presented at the Annual Meeting of the Evaluation Research Society, Baltimore, MD. (ERIC Documents Reproduction Services No. Ed 231 848)
- Nathan, R. P. (1985). The Missing Link in Applied Social Science. Evaluation Studies Review Annual, 10, 716-722.
- Patton, M. Q. (1980). Qualitative Evaluation Methods. Beverly Hills: Sage.

- Patton, M. Q. (1984, February). Sneetches, Zax, and Empty Pants: Alternative Approaches to Evaluation. Paper presented at the Meeting of the California Postsecondary Conference on Evaluation, Sacramento, CA. (ERIC Documents Reproduction Services No. ED 242 068)
- Patton, M. Q. (1985, April). Six Honest Serving Men for Evaluation. Paper presented at the Annual Meeting of the American Educational Research Association, Chicago. (ERIC Documents Reproduction Services No. ED 261 095)
- Schneider, G. T. (1985, October). Problems, Perplexities, and Politics of Program Evaluation. Paper presented at the Annual Meeting of the International Society for Educational Planning, Kansas City, MO. (ERIC Documents Reproduction Services No. ED 267 518)
- Scriven, M. (1981). The Logic of Evaluation. Inverness, CA: Edgepress.
- Sewell, T. J., & Coggins, C. C. (1986). The Measurement of Learning Style: A Critique of Four Assessment Tools with Implications for Research and Practice. In G. S. Wood Jr. (Ed.), Proceedings of the Midwest Research-to-Practice Conference in Adult, Community, and Continuing Education (pp. 126-131). Muncie, IN: Ball State University.
- Sillito, M. R. (1988, April). Evaluation Report of the Nechi Addictions Conference '88. Community Strength: Tomorrow's Promise. Unpublished Manuscript.
- Stake, R. E. (1985). A Personal Interpretation. Educational Evaluation and Policy Analysis, 7(3), 243-244.
- The Four Worlds Development Project, Adult Education Series. (1984). Discussion Paper One: Understanding and Preventing the Problem of Alcohol and Drug Abuse. University of Lethbridge; Lethbridge, Alberta
- The Four Worlds Development Project, Adult Education Series. (1984). Discussion Paper Two: How History has Affected Native Life Today. University of Lethbridge; Lethbridge, Alberta

The Four Worlds Development Project, Adult Education Series. (1984). Discussion Paper

Four: The Transforming Power of a New Vision. University of Lethbridge;

Lethbridge, Alberta



APPENDIX A  
NATIVE TRAINERS DEVELOPMENT PROJECT

Submitted to: Innovations Program,  
Manpower and Employment

By: Nechi Institute  
October, 1986

## PROJECT SUMMARY

### Nechi Institute Native Trainer Development Project

Positions as trainers and workshop leaders should be one of the fastest growing sources of employment for Native professionals. New training programs and training institutions targeting Native development are being proposed and implemented weekly. Almost every government department and Native organization is calling for training programs. Yet, there is no evidence that significant numbers of Native people are taking these new positions. Key informants identify a shortage of qualified Native trainers. There is no systematic process to train Native trainers, help them identify positions or provide early employment support.

Nechi Institute proposes a three year pilot project which will include a process of innovative strategies to develop, test and evaluate model strategies to address this expanding and under-utilized job market. The proposed project, designed to be self sufficient and replicable at the end of the pilot period, will include an accredited trainer development program, innovative participant sponsorship, position identification and placement strategies.

The project will address these labour market issues:

- 1) Issues related to assisting participants overcome market obstacles.
- 2) Development of flexible methodologies to assist productive employment advancement.
- 3) Identification of new professional positions.

In addition the project will directly result in new employment for 35-40 Native professional people and identification of another 50-60 potential positions.

The proposal calls for a significant cost sharing formula including substantial contributions from the proposer and other agencies and organizations. The proposal has received substantial support from a cross section of sponsoring agencies, market analyzers and potential employees.

## 2. PROJECT PURPOSE

The Nechi Instituté Native Trainers Development Project has four general purposes:

- 2.1 To develop and pilot test a model system of training Native people for professional roles as trainers.
- 2.2 To develop and pilot test a model system of recruitment, role identification, support and placement services to place Native people in permanent training positions.
- 2.3 To place 45-50 Native Canadians in permanent professional training roles by January 1, 1990.
- 2.4 To involve a recognized independent Native training organization in providing critical, previously unaddressed, services which directly impact employment of potentially significant numbers of professional Native people.

## 3. PROJECT BACKGROUND

"One of the most extraordinary obstacles to the provision of adequate training for Native community workers is a seemingly total lack of a systematic process to train Native trainers despite the fact that they are needed throughout the country."

This remarkable statement is contained in the National Native Advisory Council's position paper on training of alcohol workers forwarded to the Minister of Health and Welfare Canada in the summer of 1986. This situation is exactly the employment gap for Native professionals that Nechi Institute proposes to address.

In the last decade, Native development throughout Canada has included an ever increasing attention on training. Virtually, every needs assessment, development plan and new project or program targeted at Native communities and Native people has called for an emphasis on training, often as a number one priority. Consequently Native people and communities are enrolling in new training courses. It would seem obvious then, that new employment positions would be created for Native people as professional trainers. And yet there is little evidence that this is the case.

As the National Advisory Council study found, there are many programs and new consulting companies and institutions literally forming daily. However, they are not creating regular employment for Native people. Instead they are generally utilizing non-Native trainers, often

consultants, often from out of Canada. Again, why? Because to a large extent there are few qualified Native people to take these positions.

In 1985-86, in Alberta alone, two organizations directly involved in Native training, Nechi Institute and Four Skies Ltd. (a private firm), searched for six months for qualified Native trainers. Nechi finally talked a previous employee into coming back and Four Skies simply gave up.

Unfortunately, no previous studies, other than the Council paper for the Minister, seem to exist that specifically address this market problem. So, in completing our research for this proposal we contacted key people involved in Native training throughout the country. Unanimously they reported the same problem. Significantly, they all stated the problem precisely - There is no systematic continuous process for developing Native trainers, despite the fact the positions and opportunities for work exist.

In order to procure assessments and current Training of Trainer services Nechi staff members contacted the Federal and Provincial departments of Indian and Northern Affairs, the Secretary of State, Employment Canada, Manpower, Solicitor General, Corrections Canada and Medical Services Branch. In all, over 30 people directly involved in Native training programs were contacted. Not one respondent knew of a continuous training of trainers program specifically targeted for Native people. And all indicated an urgent need for such a system. Morris Issac, Federal Director of Training for Indian and Northern Affairs for the last 5 years stated, "We hire consultants. There have been attempts, some good ones but they are sporadic at best and no one seems willing to fill the gap to pay the training of trainers cost. There are jobs out there for Native trainers, but they do not have the training or experience." Mr. Isaac urged the proposer to indicate his strong support for the development of this project.

Chief Roger Augustine, a member of the National Native Economic Development Board, stated "there are business training programs and there are jobs for Native trainers - where are the Native trainers?"

Clearly there is a gap. Everyone seems to be creating training programs with employment opportunities. No one is preparing Native people for these positions and no one seems to be linking qualified Natives to existing opportunities. And no one is identifying and inventorying the positions that do exist.

Several factors indicate the trend to more Native targeted training will increase and produce more professional Native employment opportunities. They include:

1. Native people, for a variety of reasons, which have been described numerous times do not regularly participate in traditional academic training programs. Increasingly the modality of workshops, utilizing specially trained facilitators/trainers is being used.

2. Native people attending non-Native training of trainers programs, a handful usually leave, citing inappropriate, too technical materials and methods.
3. Transfer and devolution processes will create the need for new training programs and new positions for Native trainers with an emphasis on community-based training programs.
4. As Native people upgrade professional skills, they will increasingly seek professional roles.

This frustrating dilemma is also an opportunity. Specific marketing and unique professional training for Native trainers can in a short time result in many Native people assuming regular and consistent employment in professional roles in the \$25,000 - \$35,000 salary range.

#### 4. RESEARCH AND THE LABOUR MARKET

Nechi proposes to address the following labour market issues:

- 4.1 Facilitation of Native people into professional roles for which they are presently unqualified.
- 4.2 Identification of existing and potential positions available to, but not now filled by full-time Native employees.
- 4.3 Provision of innovative strategies to assist target group members in obtaining trainers positions.
- 4.4 Provision of innovative strategies to provide early employment support.
- 4.5 Provision of innovative professional training strategies.

Evidence of need and support for this project has been provided by many people in a position to judge the market. Their support letters are attached or will be forthcoming. All indicated a need for the project, support for Nechi Institute, assurance of non-duplication and assurance the positions for qualified Native people do or will shortly significantly exist. Several have already indicated a willingness to sponsor training of trainers participants. Some of the respondents include:

Mr. Morris Isaac, Director of Training, Department of Indian & Northern Affairs

Ms. Mary Shantz, Ministry of Attorney General, Ontario

Donald Obonsawin, Director General Operations, Medical Services Branch, Ottawa

Chief Roger Augustine, Eel Ground, New Brunswick, Native Economic Development Board

Chief Phil Hall, Stollo Nation, British Columbia, Chairperson, National Native Advisory Council

Alex Courtorielle, Director, Slave Lake Friendship Centre, Alberta

Richard Arcand, Executive Director, Yellowhead Tribal Council, Alberta

Bryan Fayant, Metis Children Services, Alberta

Paul Kyba, Assistant Regional Director, Medical Services Branch, Pacific Region

Dale McDonald, Council for Yukon Indians

Assembly of First Nations

Wayne Hill, Correctional Services, Saskatchewan

John Campbell, Regional Consultant, Medical Services Branch, N.W.T.

Rena Halfe, Regional Alcohol Consultant, Medical Services Branch, Alberta

Robert Riter, Regional Director, Medical Services Branch, Ontario

Ron Dyck, Provincial Suicidologist, Alberta

Robert McNeil, Economic Development, Indian Affairs, Alberta

Stan Shanks, Secretary of State, Alberta

(Other organizations to be added)

## 5. PROJECT OBJECTIVES

5.1 To identify and develop a preliminary inventory of 15-20 agencies, organizations, bands, firms and departments willing to sponsor specific training of trainers participants by February 28, 1987.

5.2 To continually expand this pool to include a variety of sponsor categories from across Canada until the pool numbers at least 50 by December 31, 1989.

5.3 To maintain a continuing liaison and working relationship with these sponsors during the life of the project.

- 5.4 To maintain a written, computerized inventory of these sponsors and a written record of liaison activities during the life of the project.
- 5.5 To obtain specific sponsorship, including sponsor payment of travel expenses for 15 Native participants in the Nechi training of trainers program by March 31, 1987.
- 5.6 To obtain specific sponsorship, including sponsor payment of travel expenses for 75 Native participants in the Nechi training of trainers program by December 31, 1989.
- 5.7 To develop a preliminary training of trainers curriculum package appropriate to Native people by February 28, 1987.
- 5.8 During the course of the project to test and modify this package on at least 3 occasions and to produce a comprehensive Native training of trainers curriculum package by December 31, 1989.
- 5.9 To have 15 Native professionals complete a 120 hour college or university accredited program of training of trainers by September, 1987.
- 5.10 To have 70-75 Native professionals complete a 120 hour college or university accredited program of training of trainers by December, 1989.
- 5.11 To significantly improve the training skills of 70-75 Native professionals in the following areas by December 31, 1989:
  - workshop facilitation
  - workshop planning and agenda design
  - application of learning theory
  - application of culturally appropriate learning strategies
  - group process
  - learning environment development
  - utilization and development of training materials and aids
  - learner intervention strategies.
- 5.12 To have identified 20-25 potential employment positions for qualified Native trainers by August 31, 1987.
- 5.13 To have identified 75-85 potential employment positions for qualified Native trainers by December 31, 1987.
- 5.14 To facilitate the placement of 4-6 qualified trainers from the Nechi program in employment positions by December 31, 1987.
- 5.15 To place 30 qualified Native trainers in trainer employment positions by December 31, 1989.

- 5.16 To develop a comprehensive program of initial training experience support services for Native trainers by September 30, 1987.
- 5.17 During the life of the project to field test and modify the support service program on at least 3 occasions.
- 5.18 To complete a comprehensive process and outcome evaluation of training, placement and support services programs by December 31, 1989.
- 5.19 To develop a written, financially self-sufficient program model for Native trainers employment service by December 31, 1987.
- 5.20 To develop a written, financially self-sufficient program model for a Native training of trainers program by December 31, 1989.

## 6. PROJECT ACTIVITIES

### 6.1 Management Structure

In order to provide an appropriate and adequate management structure for this project, Nechi Institute will add a trainer development component to its institute program for a period of three years. The Nechi Executive Director, Ms. Maggie Hodgson, will designate 10% of her time to provide overall leadership to this program component. The Board of Directors of Nechi Institute will of course assume final responsibility for the Training of Trainers project.

To supplement the management functions of the Executive Director, the component will hire two full-time managers; a trainer placement co-ordinator and trainer development co-ordinator. The roles of these managers are described in segment sections. In addition, one of the technical resource people hired will have direct training of trainer management experience which will be utilized on a regular consulting basis during the project period. The management support systems now in place at Nechi, the computer, bookkeeping, auditing and library elements will be utilized to provide management support services.

### 6.2 Position Placement Activities

One half of the direct service activities will be accomplished by the position placement component. This component will consist of the following activities:

#### 6.2.1 Identification of Sponsoring Agencies

This activity will consist of mail, telephone and personal visit activities to identify government departments (at all levels), private and public agencies and institutions writing to sponsor training participants. Sponsorship will include a general support



of the training program, willingness to identify, interview and encourage potential participants, willingness to pay participant's travel expenses, willingness to co-operate in the participant selection process developed by the program.

These activities will begin in Alberta, the Northwest Territories, British Columbia and at the Federal department level. The activities will result in development of a "pool" of sponsoring agencies with regular liaison and communication maintained. In subsequent months this pool will be expanded to include other sponsors until eventually (at the end of the three years) a variety of sponsoring agency types exist and the pool includes sources from throughout Canada.

#### 6.2.2 Development of a Participant Selection Process

Early in the program the Nechi position placement co-ordinator will, in conjunction with sponsoring agencies, develop a specific participant selection process. This process will be modified as a pre-training activity for each training cycle.

#### 6.2.3 Identification and Selection of Participants

At the beginning of each training cycle, the sponsoring agencies and the position placement co-ordinator (with consultation from the training co-ordinator) will implement the participant selection process and identify appropriate participants for each cycle.

#### 6.2.4 Identification of Training Positions

Using a process that parallels the sponsoring agency activities, the position placement co-ordinator will identify training positions available for Native trainers. Targets will include public and private departments, agencies and organizations with an objective of identifying a variety of position roles, agency types, geographic locations and training roles. Another objective will be the identification of permanent or ongoing positions to ensure maximum stability in placement. During the course of this project the inventory will eventually extend throughout Canada. Again, regular liaison and communication activities will enhance a pro-active utilization of placement utilization of placement options rather than a simple listing. A targeted agency, band organization or department could be a sponsor, a trainer employer or both.

#### 6.2.5 Development of Placement Process

In conjunction with potential employers identified, the position placement co-ordinator will develop a written placement process to place training of trainer participants in regular employment

training positions. During each training cycle, training participants will be interviewed for input into the placement process. This process will be modified at regular intervals during the life of the project.

#### 6.2.6 Initial Placements

Approximately 10-12 months into the project, 6 - 8 participants and potential positions will be matched. In conjunction with employers and participants, the position placement co-ordinator will initiate the placement process which will result in 6 - 8 initial placements. This process will continue at regular intervals for the next two years until the project placement objectives are reached.

#### 6.2.7 Follow-Up Assessment

The placement process design will include activities to assess the progress of each employee placed. This process will include Nechi, employer, and employee involvement and be completed every 45 days for each placement.

#### 6.2.8 Evaluation

The evaluation component of this project (section 10 of this document) will include processes to evaluate each of the listed position placement activities. Evaluation reports will be written every six months and included in activity planning and modification.

#### 6.2.9 Position Placement Package

By the end of the 3 year period in conjunction with pilot project employers and employees, the position placement co-ordinator will develop a manual that describes the system and recommendations for implementing the system. The manual will be developed in such a way that similar systems could be developed or taken over in other areas of the country by other Native organizations, regional departments, etc. The manual will contain:

- description of how the system was set up,
- listing of existing current Native trainer employers,
- listing of potential employer types and categories,
- recommendations for system set-up and implementation.

### 6.3 Training of Trainer Activities

The other half of direct service activities will be accomplished by the training of trainer component. This component will implement its activities in concert with the position placement activities. These activities include:

#### 6.3.1 Development of the Training of Trainers Course Outline

Utilizing the outline and other appropriate training of trainers curriculum as source documents, the Training of Trainers co-ordinator, in conjunction with Native training curricula technical resources and the Nechi training staff, will develop a full training of trainers core curriculum. The curriculum will be developed to be specifically appropriate for Native trainers and Native target audiences. The curriculum package will contain 8 specific training modules including competency-based measurable learning objectives, course materials (written and audio visual) course content designs, a trainers manual and a participants workbook.

#### 6.3.2 Piloting of Core Curriculum

Approximately 5 - 6 months into the project this core curriculum will be pilot tested with 15 training participants. This pilot will consist of two 10- day residential training workshops with a time period of 4 -5 weeks between the modules. The core curriculum will be piloted on four separate occasions (cycles) during the project.

#### 6.3.4 Development of Trainer Support Processes

The training of trainers co-ordinator, in conjunction with the Nechi training staff and experienced Native trainers will develop a specific process to provide support to training of trainers participants who will be conducting their initial workshops during this project. These support activities might include coaching, co-training, readings, written assessment tools, telephone support, etc.

#### 6.3.5 Practicum

Following their participation in core curriculum training, the participants will conduct workshops in their home communities, as part of their current jobs or for local agencies etc. The training of trainers staff will help participants plan these initial experiences as well as help participants initiate the workshops. During these practicum experiences the trainer support system will be implemented.

#### 6.3.6 Development of Advanced Training Curriculum

Following the completion of the initial core training pilot and during the first practicum period, the Training of Trainers coordinator, technical resources and the Nechi training staff will assess the pilot, assess participant feedback and develop the advanced training curriculum. This curriculum package will contain 2 modules including competency-based measurable learning objectives, course content designs, a trainers manual and a participant's workbook.

#### 6.3.7 Piloting of Advanced Training Curriculum

Approximately two months after the piloting of the core curriculum, the participants will return to Nechi to participate in the Advanced Training of Trainers workshop. The modules (two) will be taught in a 5-day residential workshop. The advanced training curriculum will also be piloted four times during the course of the project.

#### 6.3.8 Training of Trainers Video

During the last 18 months of the project a 30 - 40 minutes video presentation "Training of Trainers" will be produced. It has been our experience that this tool is very valuable for participants as a "refresher" and continuing learning tool. The pilot nature of this project and the desire to develop a replicable package add to the future use of the video.

#### 6.3.9 Evaluation

The evaluation component will also include processes to evaluate each of the training of trainers activities. Evaluation reports will be written every six months and included in planning and modifications.

#### 6.3.10 Training of Trainer Package

By the end of the three year period, in conjunction with pilot project staff and technical resources, both curriculum will be developed in final form. In addition another manual will be developed, "Setting Up A Native Trainer of Trainers program".

#### 6.4 Staffing

Staffing of the Training and Position Placement project will consist of three elements - full time positions, utilization of current Nechi staff and utilization of contracted resource personnel.

##### 6.4.1 Full-Time Positions

The project will require three full-time positions:

- a position placement co-ordinator,
- a training of trainers co-ordinator,
- a secretary/logistics clerk.

##### 6.4.2 Utilization of Nechi Staff

The Nechi staff will be utilized in several ways. Ms. Hodgson, Executive Director, will give 10% of her time in management of this project. Other Nechi support personnel will be contributing secretarial, clerical, reception and computer operation services. It is impossible to calculate these contributions precisely. Their costs are included in administration charges. Nechi training staff members will be utilized in a variety of capacities including: project planning, curriculum development, aiding the position placement co-ordinator, as trainers in the training of trainers program, in trainer support processes and in program assessment. For maximum flexibility and utilization of specific skills for an appropriate function it is most advantageous not to pre-assign particular staff at this time.

##### 6.4.3 Contracted Resources

Nechi Institute has a decade long history of effective cost efficient utilization of contracted resource specialists from throughout the hemisphere. The unique and specialized Native of this project will require these resources to; develop curriculum, act as trainers in the workshops, consult in program planning and management and help complete evaluation and assessment activities. In addition to this group of uses, one specific resource person with extensive experience in training of trainers will be utilized consistently throughout the project. His/her title will be: Training of Trainer Program Specialist. Another specific contract will be developed for a third-party program evaluation.

Note: The Training of Trainers workshops will require two trainers acting in a co-training capacity for each training course.

## 7. TARGET POPULATION

The target population for this project is three groups: potential Native trainers, trainer development sponsors and training position employers.

### 1. Potential Native Trainers

The target population will consist of Indian, Inuit, Metis people who seek professional positions in training positions from throughout Canada. The participant selection process will determine certain minimal experience to ensure qualified candidates. These will include:

- ability to read/write English,
- some experience in a professional capacity,
- experience as a workshop/training participant.

The training of trainers process is intended to approach training generically. Participants with a range of experience and interest will be sought including those who intend to do training in economic development, community development, human services, private enterprise development, private industry etc.

### 2. Training Development Sponsors and Training Position Employers

The project intends to develop an inventory large in scope. A particular organization might be a potential sponsor or an employer or both. Inventory and development will proceed by category including:

- Native bands
- regional Native organizations & associations
- federal, provincial government departments
- private firms, private industry, private business
- public societies and agencies
- federal, provincial, regional associations

## 8. PROJECT OUTCOMES

Completion of this project will result in the following tangible outcomes:

- 8.1 A pilot-tested model system of identifying specific employment opportunities for Native people in a determined growth market which can be replicated.
- 8.2 A pilot-tested model system of matching qualified Native professional candidates with existing employment opportunities in the \$25,000 - \$40,000 salary range which can be replicated.

- 8.3 A pilot-tested system for training of Native trainers which can be replicated in various forms and in various parts of the country.
- 8.4 A Native appropriate training of trainers curriculum package which could be marketed to a variety of purchasers or users.
- 8.5 Forty-five to Fifty Native Canadians in permanent professional training jobs in the \$25,000 - \$40,000 salary range.
- 8.6 An inventory of employment opportunities for Native trainers that includes opportunities from throughout Canada.
- 8.7 An inventory of 45-50 Native professionals qualified to fill professional training roles.
- 8.8 A 35-40 minute video presentation on the subject of training Native trainers which could be marketed to a variety of purchasers or users.
- 8.9 A significant step in filling a critical market void for Native professionals in a growing employment field.
- 8.10 A comprehensive evaluation of a Native professional development and employment placement system which could be used by other Native employment efforts.

#### 9. PROJECT EVALUATION

Nechi Institute proposes to do a comprehensive evaluation of this pilot project utilizing a contracted third party chosen from a tendered process. The evaluation proposer will submit a plan which would commence with the inception of the project and submit final reports at the end of the 3-year project. In order to maximize utilization of the evaluation efforts for internal planning and for use by other parties involved in Native employment efforts, evaluation reports would be completed every six months.

The submitted plan must include at least:

- 1. Process Level - number of employers, positions identified,
- 2. Process Level - number of participants involved in training,
- 3. Process Level - description of placement activities completed,
- 4. Process Level - summaries of participant responses to training activities,
- 5. Process Level - summaries of employers response to project systems,
- 6. Process Level - number of participants in new training roles,

7. Outcome Level - analysis of progress on stated objectives and outcomes desired,
8. Outcome Level - through analysis of training skills of each participant through use of standardized instrumentation and interviews,
9. Outcome Level - analysis of success levels of pilot placements,
10. Outcome Level - analysis of creditability of training and placement systems,
11. Outcome Level - projections for potential placement market for Native trainers,
12. Impact Level - projection of earned income derived from project outcomes - short term,
13. Impact Level - approximated projection of earned income derived from project outcomes - long term,
14. Impact Level - approximated analysis of long term Impact - long term impact of upgraded employment of project participants.

#### 10. PROPOSER QUALIFICATIONS

Nechi Institute may be the most uniquely qualified organization in Canada to implement this program. Registered under the Societies Act in Alberta, Nechi Institute has been providing training and research for Native people for over 12 years. During this time Nechi has trained over 1700 Native community workers and managers from throughout Canada. It has a variety of training programs ranging from counsellors training to program management. It has a full-time staff of 12 and an independent Native Board of Directors.

With a national reputation, Nechi has worked extensively in every province in the country; taking its variety of skills and training experiences to Native communities and regional organizations. Currently, Nechi has ongoing national research contracts, contracts and contribution agreements with the Province of Alberta, the Government of the North West Territories, the State of Rhode Island and with organizations in the Yukon and British Columbia.



Known for its accountability and innovation; to a very large degree, Nechi Institute has been the leading developer of Native appropriate learning strategies and training design. Nechi has become famous for its ability to blend traditional Native learning processes such as utilization of elders with the most technologically advanced training methods. Nechi is equally proud of its computer-based process for follow-up with training participants and its annual traditional pow-wow. Recently, Nechi has developed a first of its kind Employee Assistance Program.

The training strategies utilized by Nechi Institute are precisely appropriate for this project utilizing the management by values training framework. Nechi will model Native trainers doing training. Also important to this project is Nechi's carefully nurtured cadre of Native training specialists and technical resources. This network of expertise literally encompasses the hemisphere.

A strong believer in third-party evaluation of its efforts, Nechi is justifiably proud of the results of its last comprehensive evaluation which demonstrated among other things that:

1. Thirty-nine percent (39%) of its graduates returned to school some time after attending Nechi training.
2. The average income for graduates increased sixty-six percent (66%) after attending Nechi training.
3. Sixty-eight percent (68%) of the graduates belong to service and/or recreational associations on their reserves; sixty-one (61%) of these serve on Boards of Directors for their associations.
4. There was a forty-seven percent (47%) increase in the number of people holding any type of management position.
5. There was a twenty-four (24%) increase in the number of people who were and are now employed by bands.
6. There was a one hundred and sixty percent (160%) increase in the number of people holding program management positions after they attended Nechi training.
7. One hundred percent (100%) of the survey participants associated Nechi training with improved attitudes towards self.
8. Eighty-five percent (85%) of the graduates associated Nechi training with improvements in their family life.
9. Eighty-five percent (85%) noticed positive changes in their attitudes and performance at work.
10. Ninety percent (90%) expressed positive changes in their attitudes to/and relations with their communities.

11. Sixty-five percent (65%) of the graduates felt that Nechi had positively affected their spiritual life.
12. Sixty percent (60%) felt Nechi helped to strengthen their identity as Native people.

Several other factors contribute directly to Nechi Institute qualification's to manage this project:

- A. Between 10-12 former Nechi trainers have gone on to develop their training business or organizations.
- B. The Nechi computer system will greatly assist the inventory, recruitment and placement processes involved in this project.
- C. Nechi Institute's long history of developing relationships and credibility throughout Canada will give this project a tremendous advantage.
- D. The Nechi balance of stability with carefully planned innovation and expansion maximizes the potential for a successful project.
- E. By the time this project is in place, Nechi Institute training programs will be university accredited.

# 11. REPLICATION AND SELF SUFFICIENCY

The Nechi Institute Native Trainer Development Project is intended as a pilot project. It will develop a curriculum package, model trainer of Native trainers system, an innovative position identification and placement system for Native trainers. This can be utilized by regional Native training institutions, private firms, public departments and agencies. Once this system has been demonstrated, tested and evaluated, local or regional systems will undoubtedly utilize the models.

Nechi Institute will not require continuing manpower funding beyond the pilot of 3 years. Two beyond-pilot scenarios are possible.

## Continuation Scenario #1

The immediate need for Native trainers will to a great extent be filled by this project. Further position identification and trainer development needs will be filled by regional and local systems, utilizing local resources or smaller amounts of resources from on-going training development funds. Therefore, the national pilot would result in a variety of local and regional programs with their own funding basis.

### Continuation Scenario #2

During the course of the pilot project, program activities, client utilization and evaluation results identify a need to continue a significant Nechi Institute trainer development program to serve areas without their own processes. If this occurs, Nechi Institute will immediately develop a plan to create a self-sufficient program on a pay-as-you-go basis. Nechi has been successful in this endeavour in the past by creating tuition, scholarship, full sponsorship and fee payment programs.

In either case, the life of this project is specifically time-limited. Three years allows adequate pilot testing, system-demonstration and model-development with time and processes for modifications.

Note, if it is the desire of the Innovations program, with a limited increase in resources, Nechi can develop this self-sufficiency plan as part of the Innovations project. An interesting thought.

## 12. PROJECT BUDGET

### BUDGET NARRATIVE

1. Training and Placement salaries are \$32,000.00.
2. Secretaries salary is \$18,000.00.
3. Executive Director's time calculated at 10 % of \$40,000.00.
4. Staff travel is calculated at an average of \$1,000.00 per field visit (multiple visits), including room and board.
5. Resource travel calculated for airfare and ground expenses - average \$600.00.
6. Participants room and board, resources room and board calculated at \$50.00 per day, Nechi contributes seventy percent (70%) of participants room and board.
7. Meeting space includes training room, breakout rooms - total \$100.00 per day.
8. Administration fees calculated at 10 %, includes contributions of support staff, computer time, maintenance of building and equipment, office supplies.
9. Printing manuals include participant and trainers notebooks and materials - calculated at \$40.00 per person.
10. Final two months printing (10,000) includes 50 copies of all

manuals and materials - 6 manuals in all and 50 copies of evaluation reports.

11. Participants travel is calculated at an average of \$500.00 per trip - 3 trips required per participant.
12. Training materials are calculated at \$20.00 per participant.
13. Telephone/Postage costs are calculated at \$500.00 per month. The project will require extensive long distance calling.
14. Contracted resources are calculated at an average of \$400.00 per day.
15. Staff time is calculated at \$150.00 per day, an average for professional staff.
16. Evaluation contract calculated at \$25,000.00 per year with a three (3) step payment process.
17. Video production contract calculated at \$15,000.00.
18. Staff travel required for position identification, practicum support, job placement trouble shooting.

## **APPENDIX B**

**Contract: Nechi Institute and Employment and Immigration Canada**

### **Project Objectives**

This project will demonstrate that many more Native people can successfully become professional trainers to fill an increasing number of vacancies that will become available as Native devolution progresses. Specifically the project will:

1. To develop and pilot test a model system of training Native people, for professional roles as trainers.
2. To develop and pilot test a model system of recruitment, role identification, support and placement services to Native people in permanent training positions.
3. To place 45-50 Native Canadians in permanent professional training roles by January 1, 1990.
4. To involve a recognized independent Native training organization in providing critical, previously unaddressed, services which directly impact employment of potentially significant numbers of professional Native people.

### **Proposed Activities**

- a) To identify a preliminary inventory of 15-20 agencies, organizations, bands, firms and departments willing to sponsor specific training of trainers participants by 1987.
- b) To obtain specific sponsorship, including sponsor payment of travel expenses for 15 Native participants in the Nechi training of trainers program by 1987.

- c) To obtain specific sponsorship, including sponsor payment of travel expenses for 75 Native participants in the Nechi training of trainers program by March 31, 1987.
- d) To develop, test and modify as required training of trainers curriculum package appropriate to Native people.
- e) To have 15 Native professionals complete a 120-hour college or university accredited program of training of trainers by December 1987.
- f) To have 70-75 Native professionals complete a 120-hour college or university accredited program of training of trainers by December 1987.
- g) To significantly improve the training skills of 70-75 Native professionals in the following areas by March 31, 1990:
  - workshop facilitation
  - workshop planning and agenda design
  - application of learning theory
  - application of culturally appropriate learning strategies
  - group process
  - learning environment development
  - development and utilization of training materials and aids
  - learner intervention strategies
- h) To have identified 20-25 potential employment positions for qualified Native trainers by November 30, 1987.
- i) To have identified 75-80 potential employment positions for qualified Native trainers by March 31, 1988.
- j) To facilitate the placement of 4-6 qualified trainers from the Nechi program in employment positions by March 13, 1988.
- k) To produce a 35-40 minute video presentation on the subject of training Native trainers which could be marketed to a variety of purchasers or users.

- l) During the life of the project to field test and modify the support service program on at least three occasions.
- m) To complete a comprehensive process and outcome evaluation of training, placement and support services programs by March 31, 1990.
- n) To develop a financially self-sufficient program model for Native trainers employment service by March 31, 1988.
- o) To develop a financially self-sufficient program model for a Native training of trainers program by March 31, 1990.

### **Evaluation**

A comprehensive evaluation of this project will be carried out. The choice of a third party evaluation should be done by the proponent in consultation with Innovations Program staff.

The evaluation report should include the following:

- a) Executive summary (brief overview of the evaluation report, explaining why the evaluation was conducted and listing the major conclusions and recommendations);
- b) Background information concerning the project (proponent, nature, objectives, activities, expected results, persons involved, costs);
- c) Description of the evaluation study (purpose, design, instruments, data collection procedures, observed outcomes);
- d) Presentation and discussion of results (section organized by specific evaluation questions to be answered in the project evaluation);
- e) Conclusions (major conclusions to be drawn about the effectiveness of the project as a whole and its various subcomponents); and
- f) Recommendations (three sets of recommendations: regarding the project, the dissemination of results and the implementation of projects elsewhere).

**APPENDIX C**  
**Evaluation Proposal**  
**for the**  
**Native Trainers Development Project**

**Introduction**

This evaluation will involve the collection and analysis of data objectively, systematically, and with exactitude, to serve a variety of decision-making needs (see Bhola, 1982). The basic aims of an evaluation of the Native Trainers Development Project can be stated as follows (see Bhola, 1982):

1. To measure the abilities, skills and perhaps value orientations acquired by trainees during the various stages of the training and placement cycles or at the end of the project, and later, to gauge performance on the job in actual working situations.
2. To provide, on the basis of the above, feedback to trainers and placement personnel in regard to choice of training and placement objectives, content, methods, materials, instructional settings, etc., for appropriate remedial actions, and
3. To provide information to policy makers and planners in regard to the overall training and placement policies and models, designs, patterns and methods of recruitment, institutional setting of the programs, and allocation of resources to the whole program.

The naturalistic paradigm of program evaluation suggests that human behavior be studied in natural settings, within its total context. It can be described as 'holistic', one that studies realities whole, without dividing it artificially into parts and segments, one that



seeks to describe phenomena and search for regularities and patterns. This philosophy and approach to evaluation will be used.

The design and conduct of this evaluation project should be viewed as a collaborative process-- collaborative because it is essential in the initial design phase and subsequent revisions for the evaluator and project personnel to work together. The process because the evaluation design will of necessity evolve and the elements chosen from the "problem complex" for study may be altered, deleted, or augmented.

The evaluator will provide accurate, useful, and reliable information both summative and formative in nature. The evaluator is cognizant of the need for observing and reporting unanticipated or unintended outcomes. In this way the potential impact and scope of this project may be fully realized. Recognition is given to the unique cultural/social factors which will have direct influence on this project. The evaluator will attempt to gain an understanding of these factors and take them into consideration in all facets of the evaluation.

### **Research Design**

Data collection and analysis techniques as described below will be used for each of the fourteen elements listed in number 10. Project Evaluation of the Native Trainers Development Project. The information and processes described are not exhaustive but are a sample of the kind of data which should be gathered and analyzed.

1. *Process Level - number of employers, positions identified*
5. *Process Level - summaries of employers response to project systems*

A list and profile of employers (and perhaps participant sponsors) will be made from information gathered. Interview protocols and survey forms should be designed and used to gather information such as:

- name

- location
- type of business
- number of employees
- appropriate financial descriptors
- reasons for getting involved in the project
- expectations from the project
- perceptions of the employee
- suggestions for improvement or change
- job descriptions (type and number)
- other

A sampling of employers (or, if feasible, all of them) will receive phone calls to audit the accuracy of the information received and to pick up any additional information the employer may wish to share. The information will be tabulated, categorized, and made available to both training and placement personnel.

2. *Process Level - number of participants involved in training*

4. *Process Level - summaries of participants responses to training activities*

A sample (or all trainees if feasible) of trainees in the program will be interviewed to determine their response to the training program. These responses will be collated and summarized. Each of the program participants will complete information sheets that will provide some basic demographic information. This information will be helpful in not only describing program participants but will allow for investigation of a variety of possible relationships between the participants background and their success (or failure) in the training program and their success (or failure) in the workplace. This information will help in the development and revision of selection criteria for program participants, placement activities, and design of training programs.

3. *Process Level - description of placement activities completed*
6. *Process Level - number of participants in new training roles*
9. *Outcome Level - analysis of success levels of pilot placements*

In cooperation with placement personnel, a convenient system of listing, tabulating, and describing placement activities will be designed. A list of placements in new training roles will be kept. Information will be gathered by interviews with trainees, employers, and placement personnel and reported to assist in reviewing placement procedures and revising them as necessary. In analyzing the success levels of placement efforts, agreement of which indicators of success will be used should be reached by the evaluator, project personnel, employers, and perhaps program participants. Based on information available through the placement efforts of the placement personnel, projections for placement in the market will be made. As the project nears completion, a picture should emerge of the potential size of the market. This forecast should be framed by information describing the types of jobs, job locations, and types of potential employers.

7. *Outcome Level - analysis of progress on stated objectives and outcomes desired*

Each of the six reports will include a section detailing the progress to date of the stated objectives and outcomes as listed in section 5, Program Objectives, and section 9, Program Outcomes of the Native Trainers Development Project. Comparisons will be made between the proposed objectives and outcomes and the achieved objectives and outcomes in terms of meeting timetables and deadlines. A review of these objectives and outcomes will be included and will assist in re-thinking and adjusting these as required.

8. *Outcome Level - analysis of training skills of each participant through use of standardized instrumentation and interviews*

An accurate description of the skills to be taught will form the basis for an analysis of training skills gained by each program participant. Base line data, gathered from a pre-test will be compared with data gathered in a post-test. These tests will be designed in cooperation with training personnel, unless appropriate standardized instruments already exist. Data gathered in interviews with program participants will be used to supplement this information and will be helpful in drawing a composite picture of the acquired training skills of program participants. Information from employers can then be used to provide feedback as to the appropriateness of the skills learned for the workplace, whether they go far enough or, if different skills or combinations of skills are needed--a sort of delayed needs assessment.

10. *Outcome Level - analysis of creditability of training and placement systems*

In attempting to analyze the creditability of the training and placement systems as a whole, a conceptual framework for looking critically at these areas is necessary. There are a number of different options available. The selection of one (or a combination of them) should occur in the initial design stages of the two systems.

One approach is to describe the training and placement system in design terms. Since the primary purpose of evaluating these systems will be to intervene in the training process to improve it, the evaluator must be able to understand clearly and be able to develop adequate descriptions of the two systems in design terms.

For example we could look at the systems in terms of:

	<u>Inputs</u>	<u>Processes</u>	<u>Contexts</u>	<u>Outputs</u>
<u>Training</u>				
<u>System</u>				
<u>Placement</u>				
<u>System</u>				

Evaluation models developed by Daniel L. Stufflebeam (CIPP model) and by Robert E. Stake (Countenance model) would both appear to be useable as a conceptual framework in this context. Another alternative would be a comparison of the training and placement systems design for this project with the design characteristics of other training models used in the army and business/industry such as:

1. The Operational Training Model
2. The Participatory Training Model
3. The Action Training Model

Certain products and materials will be developed for use in the training and placement systems. These will be subjected to product evaluation techniques. Use will be made of recent research findings in the area of product evaluation to help format and develop appropriate criteria for the evaluation of the various materials (training manuals, video/film, student manuals, audio/visual aids, etc.). All these elements combine to form a complete picture of the training and placement systems.

Regardless which method, model, or approach is chosen, the data gathering will involve interviews with all training personnel, observation of training programs, and the use of content analysis and product evaluation.

*12. Impact Level - projection of earned income derived from project outcomes - short term*

*13. Impact Level - approximated projection of earned income derived from project outcomes - long term*

*14. Impact Level - approximated analysis of long term impact of upgraded employment of project participants*

Based on information gathered from program participants who have been successfully placed over the life of the project, calculations and projections will be made of earned income for the short and long term. Information, primarily from program participants and employers, will be used to assess the long term impact of upgraded employment of program participants.

### **Reporting**

The evaluation calls for five reports at six month intervals and a final, summative report at the conclusion of the project. A mutually acceptable reporting format will be designed and used for all reports. This will allow for consistent presentation, comparison, and use of the evaluation information. The six month reports, especially the first three or four will be used in a formative sense by project personnel. They will provide accurate, reliable monitoring of the project elements. Their primary purpose should be to provide feedback to project personnel such that necessary changes and revisions can occur. An oral report will accompany or precede each of the written reports. Two copies of each report will be provided.

### **Contract**

All aspects of the evaluation project should be spelled out clearly and concisely in a contract. This contract will stipulate all the formal and legal commitments of both parties in respect of the evaluation study.

**Budget**

The number of days specified in this evaluation study is fifty days per year for three years, a total of one hundred and fifty days. The per diem rate is \_\_\_\_\_ dollars per day, for a total cost of \_\_\_\_\_. A breakdown of expenses is shown below.

**Cost Estimates**

Personnel

Travel

Phone

Supplies

Outside Consultants

Secretarial Services

Overhead

Total

**Project Time Line**