



National Institute of Corrections

**Office of Juvenile Justice
and Delinquency Prevention**



**Building Leadership Development Systems in Juvenile
Justice Agencies**

Office of Juvenile Justice and Delinquency Prevention Training Program hosted
in conjunction with the National Institute of Corrections, Academy Division

FY 2004

NATIONAL INSTITUTE OF CORRECTIONS

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NATIONAL INSTITUTE OF CORRECTIONS MISSION

The mission of the National Institute of Corrections is: We are a center of correctional learning and experience. We advance and shape effective correctional practice and public policy that respond to the needs of corrections through collaboration and leadership and by providing assistance, information, education, and training.

NIC is fully committed to equal employment opportunity and to ensuring full representation of minorities, women, and disabled persons in the workforce. NIC recognizes the responsibility of every employer to have a workforce that is representative of this nation's diverse population. To this end, NIC urges agencies to provide the maximum feasible opportunity to employees to enhance their skills through on-the-job training, work-study programs, and other training measures so they may perform at their highest potential and advance in accordance with their abilities.

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Dear Participant,

Welcome to **Building Leadership Development Systems in Juvenile Justice Agencies**, jointly sponsored by the National Institute of Corrections (NIC) and the Office of Juvenile Justice and Delinquency Prevention (OJJDP). We hope that the next week will be productive and assist you in furthering your agency's capacity to develop an in-house leadership development program. Juvenile justice professionals identified the ability to develop and implement internal leadership development systems as a growing need within the field during the 1998 National Juvenile Training Needs Assessment Forum.

This training program is focused on guiding participant teams through the processes needed to develop and implement an in-house leadership development system within existing agency parameters, as well as looking at the future needs of your agency. It is based on current theory and research regarding effective assessment processes, tools and training design and delivery strategies. During the program you will have opportunities to assess your agency's current practices and to develop a draft action plan to guide the creation of your agency's leadership development system.

We trust that this training program will be beneficial to your agency's exploration of leadership development practices. One of our goals is for every participant to obtain maximum growth from their involvement in an Academy Division training program. To that end, we wish you good luck in your efforts.

Sincerely yours,

Robert M. Brown, Jr.
Chief, Academy Division
National Institute of Corrections

Donna Ray
Associate Administrator
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**Building Leadership Development Systems in Juvenile Justice Agencies
04-D801**

Barbara A. Collins, M.S., Consultant

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is an organization development consultant and trainer, working with government and private agencies to improve management and human services. She has 30 years' experience as a manager, internal consultant and CEO, including ten years as a staff trainer and training manager with the New York State Division for Youth. She has designed and delivered hundreds of adult learning programs, with specialization in management development topics. She is a founding member of the board of the Juvenile Justice Trainers Association, and served on the board for 18 years prior to becoming Executive Director for the Association. She has been working since 2002 with the Santa Cruz County (CA) Department of Probation and a multidisciplinary community coalition to assess and improve substance abuse services to youth in their juvenile justice system. She serves as a consultant to the San Francisco Department of Juvenile Probation, the International Association of Chiefs of Police, National Juvenile Detention Association; U.S. Department of Justice Office of Juvenile Justice and Delinquency Prevention (OJJDP), Office for Victims of Crime (OVC), and National Institute of Corrections (NIC), Academy & Jails Divisions; American Correctional Association; Essi Systems, Inc.; Planned Parenthood; Mountain Community Resources; Education, Training & Research Associates and others.

Patricia Murray

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has worked in the field of Juvenile Justice for the past eighteen years, as a Juvenile Probation Officer, Training Officer, Community Liaison, in Facility Satellite Foster Care and in Regional Administration. Most recently she has been a Staff Development and Training Specialist with the New York State Division for Youth, responsible for developing and delivering a wide range of training programs for various facility and community based juvenile justice services.

Patsy has also done extensive work in the area of trainer development with programs on platform skills, assessing training needs and in developing curricula. She is active in

professional associations, and has presented workshops at conferences in the areas of "Working with Aggressive Youth" and "Community Worker Safety".

Bill O'Connell . . .

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has extensive corrections experience and accomplishment spanning 33 years operating juvenile justice institutions, secure detention and community corrections. He has functioned in management positions on the local, state and national levels. For several years, while with the U.S. Justice Department, National Institute of Corrections, he managed a wide array of executive and leadership development programs and technical assistance projects for correctional agencies.

Bill specializes in human resource and offender intervention development. He enjoys an active business providing executive and management coaching, leadership training, team building and trainer/facilitator development. He regularly serves as a consultant/trainer to the United States Department of Justice, National Institute of Corrections, as well as corrections and juvenile justice agencies across the nation.

Launa M. Kowalcyk...

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is a Correctional Program Specialist with the National Institute of Corrections' Academy Division. Prior to joining the Academy staff in June 2003, Ms. Kowalcyk was the Trainer/Supervisor at the Central Counties Youth Center in Bellefonte, Pennsylvania. The Central Counties Youth Center is a secure juvenile detention facility serving ten counties in Central Pennsylvania. In addition, Launa has recently completed a six month endeavor with the Cook County Juvenile Temporary Detention Center in Chicago, Illinois. In the capacity of Project Manager, she assisted the management of CCJTDC and a private vendor in the installation of a facility wide automated resident record and tracking system.

During Ms. Kowalcyk's eighteen year career within the Pennsylvania juvenile justice system, she has participated in the full spectrum of roles within trainer development. From the student with little content expertise to the lead trainer with Pennsylvania trainer development programs, Ms. Kowalcyk has done extensive research in Adolescent Suicide, Post Traumatic Stress Disorder, and Balanced and Restorative Justice.

Ms. Kowalcyk has completed several leadership programs within the public sector. These programs include: Leadership Centre County, Pennsylvania House of Representatives' Rural Leadership Program, and Rotary International's Group Study Exchange to study the criminal justice system in Central Japan.

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The purpose of the Regionalization program is to build networks among correctional agencies to share training resources and information and participate in joint training efforts. For additional information please refer to the NIC Service Plan or web site: www: nicic.org

12/18/03

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The Northeast Region of NIC Academy Division Regionalization
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**National Institute of Corrections
Academy Division**

Module 1

INTRODUCTION TO THE TRAINING PROGRAM

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Be introduced to one another
- ▶ Receive an overview of the training program Goals, Assumptions and Agenda
- ▶ Identify characteristics of an ideal leadership development system
- ▶ Share expectations for the training program
- ▶ Identify peer coaching teams to work with throughout the training program

Training Program Goals:

Participants will:

- Enhance knowledge and gain practical experience with topics and skills related to effective leadership development; and
- Create an Action Plan for your agency's leadership development system

Training Program Assumptions:

1. **Leadership** is the level at which people are expected to *plan*, make *decisions* about programs and systems, create a *vision and goals* for their work unit...
2. **Leadership development** is for both people in management roles and potential new managers.
3. Training Unit and agency management should be **partners** in creating and maintaining leadership development systems.

IN JUVENILE JUSTICE AGENCIES

AGENDA

CONTENT	TIME
DAY 1	
I. Introduction to the Training Program	2 hours 20 minutes
II. Setting a Context for Management Development: Trends in Juvenile Justice	1 hour 20 minutes
III. Trainer and Training Function Self Assessment	20 minutes
LUNCH	1 hour
III. Trainer and Training Function Self Assessment (cont'd)	1 hour
IV. Strategies for Getting Management Buy In	2 hours
V. Establishing a Curriculum Design Team and an Advisory Board	50 minutes
DAY 2	
VI. Identifying Candidates for your Program	45 minutes
VII. Competency Development and Assessment of Managers	3 hours 15 minutes
LUNCH	1 hour
VIII. Training Delivery Options for Management Development	2 hours 10 minutes
IX. Designing and Developing Management Training/Development Strategies	1 hour 20 minutes

DAY 3

- | | |
|---|--------------------|
| IX. Designing and Developing Management Training/Development Strategies (cont'd) | 1 hour 40 minutes |
| X. Developing Training Budgets for Management Development and Using Cost/Benefit Analysis | 2 hours 20 minutes |

LUNCH

- | | |
|--|--------------------|
| X. Developing Training Budgets for Management Development and Using Cost/Benefit Analysis (cont'd) | 3 hours 40 minutes |
| XI. A Brief Introduction to the Resource Section of Your Manual | 30 minutes |

DAY 4

- | | |
|--|--------------------|
| XII. How to Evaluate Available Resources | 3 hours 50 minutes |
|--|--------------------|

LUNCH

- | | |
|---|--------------------|
| XIII. Marketing Your Management Development Program | 1 hour 20 minutes |
| XIV. Preparation for Participant Presentations | 2 hours 40 minutes |

DAY 5

- | | |
|------------------------------------|---------|
| XV. Participant Presentations | 3 hours |
| XVI. Summary/Evaluation/Graduation | 1 hour |

Characteristics of Helpful Feedback

The purpose of feedback is to provide constructive information to help a person become aware of how his/her behavior affects another person. It is important, therefore, to give feedback in a way which will not be threatening to the person and increase his/her defensiveness. Some characteristics of helpful, nonthreatening feedback are as follows:

1. Focus feedback on behavior rather than the person. It is important that you refer to what a person does rather than comment on what you imagine he is. To focus on behavior implies that you use adverbs (which relate to actions) rather than adjectives (which relate to qualities) when referring to a person. Thus, you might say a person “talked considerable in this meeting,” rather than that this person “is a loudmouth.”
2. Focus feedback on observations rather than inferences. Observations refer to what you can see or hear in the behavior of another person, while inferences refer to interpretations and conclusions which you make from what you see or hear. Inferences or conclusions may be valuable but it is important that they be so identified.
3. Focus feedback on description rather than judgement. The effort to describe represents a process for reporting what occurred, while judgement refers to an evaluation in terms of good or bad, right or wrong, nice or not nice. Judgements arise out of a personal frame of referenced or value system, whereas description represents **neutral** (as far as possible) reporting.

4. Focus feedback on descriptions of behavior which are in terms of “more or less” rather than in terms of “either-or.” When you use “**more or less**” terminology, it implies that the behavior falls in a continuum rather than quality, which is subjective and judgmental. Thus, participation by a person may fall on a continuum from low participation to high participation, rather than “good” or “bad” participation.
5. Focus feedback on behavior related to a specific situation, preferably to the “here and now,” rather than on behavior in the abstract, placing it in the “there and then.” What you and I do is always related in some way to time and place. We increase our understanding of behavior by keeping it tied to time and place.
6. Focus feedback on the sharing of ideas and information rather than on giving advice. By sharing ideas and information you leave the other person free to decide how to use the information. When you give advice, you tell him what to do with the information.

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Module 2

SETTING A CONTEXT AND IDENTIFYING TRENDS

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Examine trends in juvenile justice, in the work force and in management
- ▶ Determine how these trends may affect their agency and management development program

TRENDS AFFECTING JUVENILE JUSTICE MANAGERS

A. Identify five (5) trends/developments in juvenile corrections and detention that have affected leaders in juvenile justice in the last 10 years.

1)

2)

3)

4)

5)

B. Identify five (5) factors that have impacted the workforce in the last 10 years.

1)

2)

3)

4)

5)

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Module 3

TRAINER AND TRAINING FUNCTION SELF-ASSESSMENT

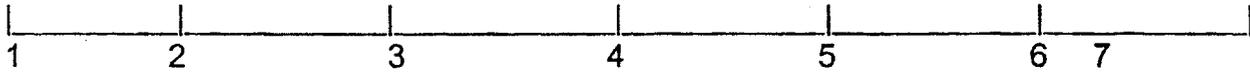
PERFORMANCE OBJECTIVES

Participants will:

- ▶ Assess their own and their unit's capacity to develop effective leadership development programs
- ▶ Create a preliminary plan for further development (self and unit)

TRAINER SELF-ASSESSMENT

As you complete this assessment, please use one of the two continua, below, to rate your response.



No
Experience

Somewhat
Experienced

Very
Experienced

OR:

No feedback on this/
Not very good

Some feedback/
Do this okay

Much positive
Feedback on this

Technical Skills:

- _____ Familiarity/experience with management and leadership functions , i.e., managing staff, developing budgets, acquiring resources, creating a vision, setting goals, conducting strategic planning
- _____ Conducting needs assessments for managers
- _____ Designing training programs/events for managers
- _____ Evaluating training programs
- _____ Creating training systems

Interpersonal Skills:

- _____ Effective listening skills (e.g., showing attention, paraphrasing, responding to level of intensity, summarizing)
- _____ Effective presentation skills; influencing/convincing others
- _____ Group facilitation and management skills

- _____ Supportiveness (noticing and praising contributions and growth of others)
- _____ Resolving conflicts between others, or between self and others
- _____ Confronting inappropriate behavior or statements
- _____ Dealing with resistance

Consulting Skills:

- _____ Clarifying the tasks and goals/outcomes to be accomplished
- _____ Establishing clear responsibilities for self and "client"
- _____ Establishing reasonable work schedules and deadlines and meeting them
- _____ Including important contributors in review and decisions
- _____ Reporting results in ways that meet client needs and expectations

TRAINING UNIT ASSESSMENT

Staffing:

- _____ Sufficient numbers of staff to design and/or deliver/co-facilitate management training
- _____ Staff have sufficient management and/or training background to have credibility in management development
- _____ Sufficient funding to acquire resources, including external consultant services

Influence:

_____ Training manager has credibility/influence with agency managers (central and facility levels)

Information and Resources:

_____ Staff can access current books, materials, designs for management development programs

_____ Unit has system in place to produce reports and provide agency with feedback on results of training provided

Module 3: Trainer and Training Function Self-Assessment

NOTE GUIDE

To create *effective* leadership development programs, Agency administration must:

1. _____
2. _____
3. _____

Notes:

Some benefits of being an *Internal Consultant* to your agency are:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Notes:

Module 3: Trainer and Training Function Self-Assessment

Team Assignment

1. Share your *Trainer Self-Assessment and Training Unit Assessment* scoring. Identify your own strengths and areas for improvement.
2. Identify any additional *Technical, Interpersonal and Consultative* skills each of you has.
3. Identify any additional *Staffing, Influence and Information and Resources* strengths your Training Unit has.

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Module 4

STRATEGIES FOR GETTING MANAGEMENT BUY-IN

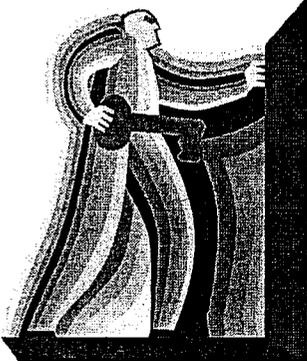
PERFORMANCE OBJECTIVES

Participants will:

- ▶ Assess their agency to determine who has influence and their access to them
- ▶ Determine what they need to do to influence these influential people to support a leadership development program

Module 4:: Strategies for Getting Management Buy-In

The keys to building support



Who in your agency has influence over policy decisions and/or the direction of the agency? Do certain divisions or units seem to have influence? Take a moment to capture your ideas.

- _____
- _____

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

What is your level of access to the above individuals and/or groups? Add this information to your list, above.

Influencing Strategies and Ideas:

- ISF _____
- ISF _____
- ISF _____

More influencing strategies and ideas

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Module 5

ESTABLISHING A DESIGN TEAM AND ADVISORY BOARD

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Determine the characteristics and composition of an effective training design team and training advisory board

Module 5 – Establishing a Design Team and Advisory Board

Purpose of the design team . . .

Composition of the training design team . . .



Purpose of an advisory group . . .

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Module 6

IDENTIFYING CANDIDATES FOR YOUR PROGRAM

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Explore the various criteria to be used to select participants in their leadership development program
- ▶ Develop recommendations to be used in the selection process to present to management

Module 6 – Identifying Candidates for Your Program



Factors that should be considered in decisions about the selection of candidates for your Leadership Development Training Program . . .

Factors that may be important to my organization in selecting candidates

Other information to gather from stakeholders in my organization regarding the candidate selection process

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Module 7

**COMPETENCY DEVELOPMENT AND ASSESSMENT OF
MANAGERS**

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Determine the competencies to be effective managers in their organizations
- ▶ Analyze the value of 360° assessments and other assessment instruments
- ▶ Complete a developmental plan to meet needs identified in a competency assessment

360° ASSESSMENTS

360° assessments are based on studies of very effective leaders; typically the research has been validated and has high reliability. Usually, they are in the form of a questionnaire or survey developed or purchased to assess the leadership, management and technical skills of managers or potential managers, or **to** assess managers **against** the competencies that have been identified as necessary for success in a particular organization.

The results of these assessments identifies a leader's strengths and where there are opportunities for development/improvement. Assessment results can form the basis for a management development program.

Some examples of 360° assessment instruments are:*

Skillscope
Leadership Practices Inventory (LPI)
Management Leadership Practices Inventory (MLPI)

*You will find references to the sources for all instruments in the bibliography in the Resource Section of your manual.

The value of 360° feedback to individuals is:

- People don't know what they don't know - provides us with information we don't ordinarily get.
- People show different sides to different people.
- People don't always accurately assess the impact they have on others.
- It provides one with multiple data points (boss, peers, direct reports, clients; from people who have first hand experience with the individual.
- 360° feedback offers accountability.

The value of 360° assessments to an organization is:

- Information to help create development plans for organizational and individual impact;
- Potential to create norm group data to measure against;
- Helps set a developmental climate throughout the organization;
- Provides an opportunity to get objective feedback;
- It becomes "OK", even encouraged to give and receive constructive feedback.
- Assessment can be repeated periodically to measure improvement.

PERSONALITY TYPE INSTRUMENTS

This group of instruments provide an opportunity for individuals to assess themselves in terms of their preferences in style areas. Some examples of these instruments are:

Myers-Briggs Type Indicator (MBTI)
Kiersey-Bates Personality Styles Instrument
Enneagram
DISC

Of these, the Myers-Briggs Type Indicator is the most widely used. The results indicate how an individual prefers to take in and process or organize information, in order to draw conclusions (make judgments).

These instruments are based on Carl Jung's theories of personality type. The military first used them to provide information about how soldiers would function. All of us can use all styles, but feel most comfortable when we use our preferred styles - and tend to revert to them when in stressful situations. Other factors certainly influence our behavior, beyond our personality type, such as: environment, socioeconomic status, age, religion, political identification, culture.

The value of these personality type instruments for individuals is:

- Creates a common language for understanding differences between people
- Builds awareness about how individuals approach work and life
- Provides a framework for working more effectively with others
- Helps identify areas of individual developmental need

The value of these personality type instruments to organizations is:

- Creates a shared awareness and appreciation about differences among people and how and why they exist
- Helps organizations build teams more effectively
- Gives people in organizations the opportunity to work more productively together

Module 7: Competency Development and Assessment of Leaders

NOTE GUIDE

Competencies are _____ and
_____ characteristics of a person that include
using _____ and demonstrating
_____, _____ and
_____ that contribute to performing well.

David Workman, The Workman Group, Ltd.

Competency Assessment is based on *determining competencies* for managers derived from:

1. _____
2. _____ a
nd deciding on the desired
_____.

Manager *Performance* is measured by looking at:

1. _____
2. _____

Manager *Potential* is indicated in people who:

- _____
- _____
- _____
- _____
- _____
- _____
- _____

360° Assessments

Notes:

Personality Type Instruments

Notes:

Module 7: Competency Development and Assessment of Leaders

Team Assignment

For the Sample Competency Assessment assigned to your group:

1. Identify the *strengths* and *developmental needs* of the individual being assessed.

Strengths:

Needs:

2. Identify several options for a *development plan* for the individual. How can this individual best improve his/her skills or competencies?

COMPETENCY ASSESSMENT

COMPETENCIES

RATING SCALE

Communication Skills

Circle the most appropriate rating

- | | | |
|----|--|---|
| 1. | Written Communications - ability to write clearly and succinctly in a variety of communication settings and styles; can get messages across and achieve the desired outcome. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 2. | Presentation Skills - ability to be effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, direct reports, and supervisors; effective inside and outside the organization, handling both data and controversial topics; commands attention and can manage group process during a presentation; can change tactics when necessary. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 3. | Public Relations - maintains effective communication and builds communication channels with local and regional community groups, media and governmental and municipal agencies as well as medial outlets. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 4. | Listening - is an attentive and active listener; has the patience to hear people out; can accurately restate the opinions of others even when s/he disagrees. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |

Leadership Skills

- | | | |
|----|---|---|
| 1. | Integrity and Trust - is trusted; is viewed as direct and truthful; can deliver the unpopular truth in a positive manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
|----|---|---|

- | | | |
|----|--|---|
| 2. | Motivating Others - Creates a climate where people want to do their best; can motivate a variety of people including direct reports, team, project members, peers, clients; can assess each person's strengths and get the best out of him/her; empowers others; invites input and shares ownership and visibility; makes people feel valued and is well regarded by those s/he works with | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 3. | Vision and Purpose - creates a compelling and inspired vision or sense of core purpose; sees beyond today and helps others see possibilities; is optimistic and creates mileposts and symbols to rally support; makes the vision something that others can share; inspires and motivates the unit or organization. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 4. | Composure - handles pressure well; does not become defensive or irritated when things get tough; is considered mature; can be counted on to hold things together during tough times; can handle stress; does not get knocked off balance by the unexpected; doesn't show frustration when resisted or blocked; is a settling influence in a crisis. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 5. | Command Skills - enjoys leading; can take unpopular stands if necessary; encourages direct and tough debate and can end it and move on; is looked to for direction in a crisis; faces adversity; gets energized by tough challenges. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 6. | Politically Astute - understands how people and organizations function; anticipates where the stumbling blocks are and plans accordingly; views politics as a normal part of organizational life and works to adjust to that reality; can maneuver through political situations effectively to get things done. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |

- | | | |
|----|---|---|
| 7. | Dealing with Ambiguity - copes with change effectively; can shift gears comfortably; can make decisions and act without having the complete picture; can handle risk and uncertainty; doesn't have to have all the answers. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
|----|---|---|

Management Skills

- | | | |
|----|--|---|
| 1. | Delegation - is comfortable delegating both routine and important tasks and decisions; shares both responsibility and accountability; tends to trust people to perform; lets direct reports finish their work. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 - mastery |
| 2. | Directing Others - establishes clear directions; sets objectives; distributes workload appropriately; sets work in a well-planned and organized manner; maintains two-way communication with others on work and results; is a clear communicator. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 3. | Functional/technical skills - has the skills, education, background and experience to do the job at the highest level of performance. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 4. | Conflict Management - sees conflict as opportunity; reads situations quickly; is good at focused listening; can work out tough agreements and settle disputes fairly; can find common ground and get cooperation with minimum emotion. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 5. | Negotiating - can negotiate effectively in tough situations with both internal and external groups; can settle differences fairly; can win concessions without damaging relationships; can be both direct and diplomatic; is trusted by other parties in the negotiation; has a sense of timing. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |

- | | | |
|----|---|---|
| 6. | Teambuilding - gets people to work together effectively; creates strong morale and spirit in the team; shares wins and successes; fosters open dialogue; let people finish and be responsible for their work; defines success in terms of the whole team; creates a sense of belonging. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 7. | Managing Diversity - deals effectively with all kinds and groups of people; actively encourages diversity and actively recruits and hires with diversity in mind; works sensitively with people of all races, cultures, abilities, ages and genders; is tolerant and encouraging of diversity in style and preference to achieve high performance and creative problem solving. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 8. | Recruiting and Selecting - understands what skills are necessary for the jobs available. Hires the best people available; is willing to hire strong capable people with skills and talents that s/he doesn't possess. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 9. | Fairness - treats direct reports equitably; acts fairly; has candid discussions; doesn't have hidden agenda; doesn't give preferential treatment. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |

Organizational Skills

- | | | |
|----|--|---|
| 1. | Decision Making - makes decisions in a timely way; can make decisions when information may be incomplete and under tight deadlines and pressure; is able to make quick decisions. Makes decisions based on analysis, experience and judgment; most of her/his solutions and suggestions turn out to be correct over time; is sought out by others for advice on decisions. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
|----|--|---|

- | | | |
|----|--|---|
| 2. | Planning - can accurately assess the difficulty and time frame for tasks and projects; sets clear objectives and goals; can break down work into process steps; develops schedules and task assignments; can anticipate and adjust to problems and roadblocks; measures performance against goals; evaluates results. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 3. | Process management - can figure out what is necessary to get things done; knows how to organize people and activities; can arrange tasks for efficiency; know what to measure and how; can see opportunities for synergy and integration where others cannot; can simplify complex processes; gets more out of fewer resources. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 4. | Organizational Understanding - knows how the organization (unit, division, etc.) works; is knowledgeable about current and possible future policies, practices, trends, and information that may affect her/his unit; is aware of the strategy and tactics that work in his/her environment. Can manage through complex political situations effectively; is sensitive to how people and organizations function; anticipates where problems may exist and plans his/her approach accordingly; is realistic about organizational realities. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 5. | Setting Priorities - knows what is important and where to spend time; quickly recognizes the critical issues and distinguishes them from the trivial; can sense what will help or hinder accomplishing a goal; eliminates roadblocks; creates focus. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |

Personal/Interpersonal Skills

- | | | |
|----|--|---|
| 1. | Action Oriented - enjoys working hard; has energy for the tasks that must be done and sees them as challenging; is not fearful of acting with a minimum of planning; takes advantage of opportunities. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
|----|--|---|

- | | | |
|----|---|---|
| 2. | Approachable - is accessible; easy to talk to; spends time putting others at ease; can be warm and sensitive and patient with interpersonal anxieties of others; build rapport; is a good listener; has access to information early and informally and can act on it. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 3. | Interpersonal Skill - relates well to a wide variety of people both within and outside the organization; builds constructive and effective relationships; uses tact and diplomacy; can diffuse even high-tension situations comfortably. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 4. | Intellectual Skill - can deal with concepts and complexity comfortably; considered sharp, capable and knowledgeable by others. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 5. | Time Management - Uses his/her time effectively and efficiently; concentrates on the more important priorities; gets more done in less time than others; can deal with a range of activities; meets deadlines and time commitments. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 6. | Sense of humor - demonstrates a positive and constructive sense of humor; can laugh at self and with others; uses humor to help ease tension. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |
| 7. | Personal Learning - knows when s/he needs to change personal, interpersonal, managerial behaviors; is aware of others' reactions to his/her attempts to influence and perform; seeks feedback; is sensitive to changing demands and requirements and changes accordingly. | 1 = unskilled
2 = developing
3 = competent
4 = very competent
5 = mastery |

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Module 8

LEADERSHIP DEVELOPMENT/TRAINING DELIVERY OPTIONS

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Analyze several options for building leadership competencies and skills, including the advantages and disadvantages of the various delivery options
- ▶ Determine which competencies are most effective in developing specified competencies
- ▶ Evaluate some options for appropriateness in their settings
- ▶ Develop a preliminary plan for delivering an option

DELIVERY OPTIONS

1. Assessment instruments (360, style inventories)

- **What it is** - a survey completed by the individual being assessed, his/her supervisor, peers, direct reports (and in some cases clients or other constituent groups) used to assess individual competencies in leadership, management, interpersonal communication and other areas identified as critical for success in a particular position or organizational setting. 360 assessment refers to the fact that data is gathered from a circle of individuals who interact with the person being assessed in different but interdependent ways.
- **How to use it** - typically organizations will identify a target group of managers to be assessed as part of a leadership development process. In some instances the assessments are used to assist in a succession planning process and helps identify high potential individuals who could become leaders in the organization. The surveys may be completed as paper and pencil, or electronically. The responses are usually summarized by group (i.e. peers, direct reports, clients) in order to keep individual responses confidential. However, the supervisor and the individual's own responses are identified. The individual being assessed usually gets some coaching or assistance in interpreting the information and developing a plan of action. Between 7 and 10 surveys are usually completed for each individual being assessed.
Organizations can maintain aggregate data to use for measuring against other similar organizations, and to help identify areas of development for groups of managers. 360 assessments are often completed on a periodic basis to assess improvement.
- **Benefits** - gives individuals important information about how they are perceived by others and where improvements should be made. Provides a basis for individual development plans and organizational training and development planning.
- **Disadvantages** - can be costly and time consuming and requires considerable time in follow up coaching and development planning and monitoring.
- **When to use it** - assessments are especially valuable in helping identify

what competencies are important in a particular setting. They are good as a starting point for determining what training, education and developmental opportunities should be provided. They can give individuals important feedback about their performance and help focus them on improvements.

2. Mentoring/coaching

- **What it is** - a program which takes advantage of the expertise and experience of more seasoned people to guide and support less experienced and seasoned people in organizations.
- **How to use it** - mentoring programs are established either through a human resources recruitment and retention effort, or by senior leaders interested in developing existing talent among junior members of the organization. The organization must be committed to mentoring for it to be effective. There must be a clear compelling reason to have such a program and it must have the support and commitment of the highest levels of the organization. Mentoring programs pair senior leaders with junior people over a period of time (6 months to 1 year or longer) for the purpose of sharing knowledge, skill and experience with the junior person. Mentoring can involve shadowing, coaching, work assignments and other activities where the junior person has the opportunity to learn from the experience of the more senior person.
- **Benefits** - there are benefits for the mentor, the mentoring recipient and the organization. Most often mentors report gaining perspective and renewed motivation as well as clarifying their own purpose within the organization. Mentoring recipients benefit from the personal attention and guidance of a seasoned, experienced individual and often gain a greater sophistication about how to do things in the organization than those who are not mentored. The organization benefits from greater retention rates, and a better understanding of the needs and expectations of both the senior and junior members of the organization. A well designed and implemented mentoring program can inform the organization about the climate much more effectively than some employee satisfaction surveys.
- **Disadvantages** - poor pairing of mentor and mentoring recipients, programs that do not have a clear organizational purpose, lack of commitment from senior management, and poor coordination and follow through can make a well intentioned program fail. The danger is in creating

expectations which are not met. No mentoring program is better than an ill conceived and implemented program.

Training for mentors is also a critical feature of a good mentoring program. If mentors are not well trained, they and their mentor recipient can become derailed and create dissatisfaction.

- **When to use it** - in organizations where recruitment and retention are issues mentoring can be an effective way to reduce turnover and attract talent. It should only be used when the organization is willing and able to commit resources to the effort and have sound organizational reasons for implementing a program. Ongoing support of both mentors and mentor recipients, good coordination and communication, and sufficient numbers of qualified mentors are all essential.

3. Classroom/small group instruction

- **What it is** - a learning experience which is conducted with groups of employees or an open enrollment (public) program which provides individuals with knowledge, practice and discussion of a topic or series of topics.
- **How to use it** - probably the most common form of training, education and development, classroom/small group instruction is usually provided when an organization believes its employees need to either learn new skills or develop existing skills, gain knowledge and information, reinforce organizational change efforts or culture through employee interaction or a combination of these.
- **Benefits** - one clear benefit of classroom instruction is economy of scale, many people can receive the same information, training, knowledge at the same time; in internally designed and delivered programs employees can learn about the expectations of the organization at the same time they are learning a new skill; employees come together and share experiences through discussion and small group activity and learn more about the organization and its various units; it creates a common language by introducing concepts, skills and information to groups simultaneously; it creates a "safe" practice field for experimentation with new skills and information.
- **Disadvantages** - classroom instruction is often relied on to the exclusion of

other alternatives; poorly designed programs, unqualified instructors, lack of follow through on the job, and unclear purpose can all combine to make classroom instruction unproductive.

- **When to use it** - when it is important for large groups of employees to receive information, build skill or learn new procedures, policies or other organizational communication, classroom instruction is very effective. As part of a development plan where managers are prepared for what their employees will learn and know how to reinforce it; where time is of the essence and information and knowledge must be conveyed quickly are some of the reasons to use classroom instruction.

4. **Experiential/Action Learning (Structured work assignments)**

- **What it is** - assignments or work experiences which occur in the normal course of work, but which have an explicit learning element involved. Often these experiences require that projects, reports, follow-up activities be completed.
- **How to use it** - experiential learning or structured work assignments can be adjuncts to classroom instruction, mentoring, or as part of an individual development plan following a 360 assessment. These assignments must be meaningful and related directly to either the individual's work or the organization's strategic goals. Coordination, coaching, support and follow up are all essential for these activities to be effective.
- **Benefits** - real world experience is the biggest advantage of experiential or action learning. Individuals have a chance to learn while doing and benefit from experiencing the positive aspects of the learning. The organization benefits because these activities tend to escalate on-the-job learning for high potential individuals. The results of the projects, reports, and team efforts are usually of excellent quality.
- **Disadvantages** - if poorly conceived and executed, these activities can feel like "busy work". Without a meaningful connection with the organization's main work, experiential learning can frustrate and de-motivate, rather than inspire and motivate individuals. Close interaction with managers or other designated supervisors who understand the value of the activity and can provide immediate feedback and recognition is very important, lacking this employees can feel exploited.

- **When to use it** - this activity is best used in conjunction with other learning delivery options as an enhancement to embed learning into the work setting. To provide “experience” with skills, knowledge, systems or processes learned in the classroom or through other sources.

5. Video/audio programs, computer based/self-paced training (web based)

- **What it is** - pre-packaged video, computer based or audio programs focused on knowledge, skill or other information. Often used in conjunction with classroom or small group instruction, provides an alternative method for highlighting information or knowledge.
- **How to use it** - can be used for independent learning to provide specific focus on a topic or skill. Individuals can view or listen at their own pace and learn the material as needed. As part of classroom instruction, or action learning, video/audio and computer based programs can enrich the learning by providing an external expert in an internal program, or showing examples of a skill or competency that helps individuals understand what is being learned by seeing or hearing both correct and incorrect examples.
- **Benefits** - provides alternative method of receiving information or understanding skill. Can be more useful for some skills where examples are necessary. Computer based instruction often has embedded practice, quizzes, and other check points to self score progress or acquisition of knowledge. Provides a focus for group discussion or individual reflection on specific aspects of certain skills, competencies or processes.
- **Disadvantages** - if used as the only source for learning and used individually only, video/audio, computer based programs can be misunderstood, or ineffective. If all learning is based on this medium it can be isolating and may not foster good team work or effective communication skills.
- **When to use it** - Video/audio, computer based programs can provide an important perspective, transfer specific skills and procedures, and should be used in conjunction with other formats and delivery options to enhance learning.

6. Simulations

- **What it is** - a structured activity used to create an “experience” which gives

participants the opportunity to discover what might happen if this experience were to occur in their organization. It is also used to highlight existing circumstances and heighten sensitivity to issues.

- **How to use it** - simulations are often incorporated into classroom programs, or as part of a group activity because they provide a structured environment to try out experiences that can be evaluated and lessons can be drawn out; when the only effective way to learn is to experience the feelings and thoughts which occur when these situations occur in the real world
- **Benefits** - puts people in the place of someone having an experience which could occur in the workplace. Gives people a chance to see, feel and experience what it would be like if this happened to them. Gives people a chance to see how they react in circumstances, both favorable and unfavorable and get a sense of how others react.
- **Disadvantages** - may sometimes be too artificial and people are unable to make the connection with their work setting.
- **When to use it** - when it is important for people to really experience their own and other's feelings, reactions and thoughts in certain settings or circumstances.

As you reflect on the delivery options, consider the following questions:

- What is the organizational reason for developing this delivery option?
- What organizational support exists and what needs to be developed?
- What are the criteria for success?
- Who needs to be involved in developing the option?
- Who's going to manage, coordinate, and oversee the program?
- What other information would you need before introducing this option?
- What is already in place?
- How will this initiative be communicated to managers?
- What time and place constraints do you need to consider?
- How will you motivate managers to participate?
- What ongoing support will need to be provided?
- How will you evaluate the success of this option?
- What will you need to do to ensure continuous improvement of the option?
- What are the pitfalls and how will you avoid them?

	assessment	classroom	mentoring/ coaching	structured work assignments (action learning)	video/ computer based programs	simulations
competencies						

**National Institute of Corrections
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Module 9

**DESIGNING AND DEVELOPING LEADERSHIP
TRAINING AND DEVELOPMENT STRATEGIES**

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Explore the relationship and impact of the Learning Cycle in designing leadership training and developing delivery strategies, using the Instructional Theory Into Practice (ITIP) model
- ▶ Prepare a preliminary design of a leadership training strategy

Instructional Theory Into Practice: Essential Elements of Instruction

Adapted from *Instructional Theory Into Practice: Essential Elements of Instruction - Part One*, by Lois Hay in the **Journal of Correctional Training**.

1. Anticipatory Set

In the ITIP model, an “anticipatory set” begins the lesson plan. In this section, the instructor establishes readiness for learning and begins to ensure the transfer of new information and skills to on-the-job performance.

Effective anticipatory sets serve the purpose of bringing the learner to the learning task. They are characterized by activities that focus the learner’s attention specifically on what is supposed to be learned and distance that attention from environmental or personal distraction. The trainer introduces the key conceptual focus of the lesson and explicitly states the performance objectives. Activities should reference previous knowledge or previous modules in order to “locate” the new learning and provide a frame of reference in which new information can be placed.

This connection with previous content as well as life experience provides a rationale for the learner to fully engage in the learning experience. An effective anticipatory set provides a meaningful context for training activities throughout the training. It can also help to ensure that from the first moment, the learner is involved in structuring the learning to be done and in devising the means to apply that learning.

At this stage of the lesson, trainers should eliminate activities that do not pertain directly to critical attributes of the learning task. Examples, jokes, icebreakers or stories that are interesting but unrelated should be avoided. Discussions or lectures which place the learners in passive roles should not be used at this point.

The anticipatory set should connect the learner’s personal and professional experience with the new learning. It should answer the question “Why?” -- “Why am I in this session?” “Why do I need to learn this?” Especially for adult learners, this part of the lesson serves to acknowledge and appreciate the wealth of experience they bring to the new learning situation.

Although input follows anticipatory set in the lesson plan and the lesson delivery, the determination of content for the input phase should come first in the trainer’s planning process. Content determination will flow from the established outcomes and performance objectives originally established by the needs assessment process. It is almost impossible to design an effective anticipatory set without a clear understanding of the

instructional input necessary to reach the stated performance objectives.

Trainers should make every attempt to ensure that participants go forward from the anticipatory set into the lesson without misunderstandings or misgivings, positively and accurately “anticipating” what is to come.

2. Instructional Input

A lesson plan developed according to the ITIP model will be based on performance objectives derived from a needs assessment process. Such a lesson would begin with an anticipatory set that prepares the learner by connecting prior knowledge and experience with the new learning. The next element of the lesson plan, known as the “instructional input” will be structured according to decisions the trainer makes on several key issues.

One of these key issues is the nature of the learners themselves. Individual preferences for learning style should be taken into account in designing input. As well as style differences, learners also differ in the perceptual modality they prefer. Most people use a combination of modalities but show a preference and an enhanced use of one or two. Visual perception is preferred most highly, but there are also strong preferences for auditory (hearing), tactile (touch) and kinesthetic (movement) modes. Since one can not be sure of the exact preferences of any group, we should always present information in both the visual and auditory modes, and use the kinesthetic and tactile modes whenever possible.

Another key issue in determining input strategies is the nature of the learning task. The complexity of the information to be presented has implications for the delivery method that is chosen. Moving from the simple to the complex may be effective. It may also be necessary to “chunk” the information, so that it is presented in manageable bites rather than as an overwhelming whole.

The relationship of the input section of the lesson to the achievement of the overall performance objectives must be taken into account. For any level beyond simple information sharing and comprehension, the input must be structured taking into account the practice and skill building activities that will follow. The nature of the instructional input should model the kind of thinking and learning to be done.

The critical nature of particular ideas, facts or concepts and how they relate to each other determine the structure and order of the instructional input. Of all the available information related to any type of learning, what will be selected? What are the key points of the learning and what materials, examples and questions will focus learners on those points? What analogies, metaphors or visuals will illustrate essential concepts or skills? What

contrasts or comparisons will help participants to integrate this information with knowledge they already have?

Another important strategy for the trainer in this section of the lesson is checking for understanding. How will you know if the desired learning is taking place? How will you modify or adjust to redirect learning if comprehension is lacking?

Although the traditional mode of input is lecture or written material, the prior considerations may demand that these materials be supplemented or replaced with higher level strategies that draw information from the participants rather than simply presenting it to them.

3. Guided Practice

ITIP lessons begin with an anticipatory set that prepares participants to learn. This is followed by instructional input strategies that are interactive, learner centered and formatted to cause participants to deal with content at higher levels of thinking. These first two elements of lesson design will not have the desired impact without a chance for participants to practice under the guidance of an instructor. It is through such guided practice that information, concepts and skills are incorporated into ongoing job performance. Research on learning and instruction tells us that without practice and feedback on performance, only two to five percent of participants will ever attempt new skills or behaviors upon returning to daily responsibilities.

We also know that practice and application of training content is often missing in agency curricula. Lecture, varied by question and answer sequences and discussion, continues to dominate the time devoted to training. The ITIP model asserts that without practice opportunities provided in each lesson, without some chance for learners to be guided through application of information and concepts, job performance will not change and instructional time spent in lecture will be largely wasted.

To avoid such waste and to take advantage of the potential impact of practice on improving job performance, training design should ensure that application of content, including the practice of skills and behavior sequences, is appropriately located in the lesson plan. All practice should focus on the desired learning, that is, "how-tos" rather than "how-not-tos". Practice situations should closely simulate job conditions and contexts. Learners should have sufficient, varied and correct models and examples to follow. Trial efforts by learners should be monitored by the instructor and learners should receive immediate, specific feedback that reinforces or corrects their performance toward the desired outcome.

Several opportunities should be provided to practice each skill so that refinement and

improvement of performance can occur. Practice should go beyond simple repetition and include experimentation with alternatives, a chance to reflect on one's own performance and to get feedback from others involved in the same learning experience.

Skill development training that translates policy into operational procedures may already incorporate practice. New agency staff often receive classroom instruction with demonstration and practice time in the use of restraints, searches, defensive tactics, etc. Upon returning to the job they may be paired with an experienced officer who provides feedback and further demonstrates on-the-job application of skills. This model can also be used profitably in areas of training that have been considered "soft skills" or conceptual in nature. Programs on counseling, leadership, diversity, etc. can become more effective and have more impact if learners have an opportunity to apply the information, to actually try out behaviors and learn to evaluate and choose among options as situations change. To incorporate crucial guided practice trainers need to allocate time for practice sessions within the lesson structure as well as on the job. Support for this use of instructional time should come from needs assessment and job/task analysis data

4. Independent Practice

The ITIP lesson plan format uses an anticipatory set to prepare participants to learn, instructional input strategies appropriate to adult learners to convey content and guided practice that gives learners feedback on initial trials of new skills and behaviors. The next component of the ITIP model, independent practice, may or may not take place in the classroom setting.

Independent practice is practice that occurs without the direct supervision and assistance of the instructor, although he or she may structure the assignment or individual learning activity within which the practice takes place. Independent practice can make the use of the learned material more automatic through repetition. It can extend the amount of information learned beyond what is generally provided to everyone in the classroom as well as expand the learner's perception of how content can be applied in varied settings. Independent practice can cause new information to become an integrated part of an existing system of knowledge, abilities and interests. It personalizes the learning so that each trainee can use the new skill appropriately.

Adult training in a classroom environment rarely includes such independent practice. A fact of adult training/learning is that most significant practice opportunities arise in the course of job performance, while being evaluated against standards and where the stakes are high. In spite of this fact, trainers can structure several types of independent practice into instruction and build bridges between the training environment and the workplace. In the classroom, the opportunity to relate the learning to the workplace can come through

verbal reflection and reaction to simulations or case studies, applications of specific techniques to the individual work setting and through action planning for transfer of classroom learning to the job. On the job, trainees can be supported in the practice of new skills and behaviors through continued connection with the instructor, mentoring or coaching, and periodic checks by supervisors to see if skills and behaviors learned are in place.

Since, in the classroom, independent practice will be mostly cognitive and not directly observable, it should be detailed enough to indicate that the learner has considered options and real world constraints. Note taking guides that include critical application questions can insert independent practice into the middle of instructional input. Discussion guides that focus group sharing of how learners will use the training experiences in the workplace provide personalization. Learners may be asked to anticipate difficulties in implementation and strategize how such difficulties may be overcome, thereby strengthening thoughtful application. Written action plans to be used upon return to work are helpful in integrating new knowledge into existing expertise. In more ideal situations, class sessions can be interspersed with a variety of individual assignments ranging from readings to written reports to actual work experiences. These assignments are evaluated in subsequent classes and classroom activities designed to build on them or address efficiencies identified. This process may culminate in a project that demonstrates overall learning. Workplace mentors can be used to monitor application and assignments. Given the importance of independent practice in transfer of training to job performance, trainers should include it in planning whenever possible.

5. Closure and Evaluation

The terms “closure” and “evaluation” refer to any point in an instructional sequence where it is appropriate or necessary to summarize, emphasize or personalize learning. In the ITIP lesson plan format, a section which concludes the lesson is also referred to in this manner. It formally serves those functions described above as well as being a final opportunity, within the classroom time frame, for the trainer to mediate the content and the learning process. Evaluation, in this context, refers to assessment of the knowledge or skill level of the learners, as well as the assessment of the training itself by participants. Effective evaluations serve as needs assessments for further training.

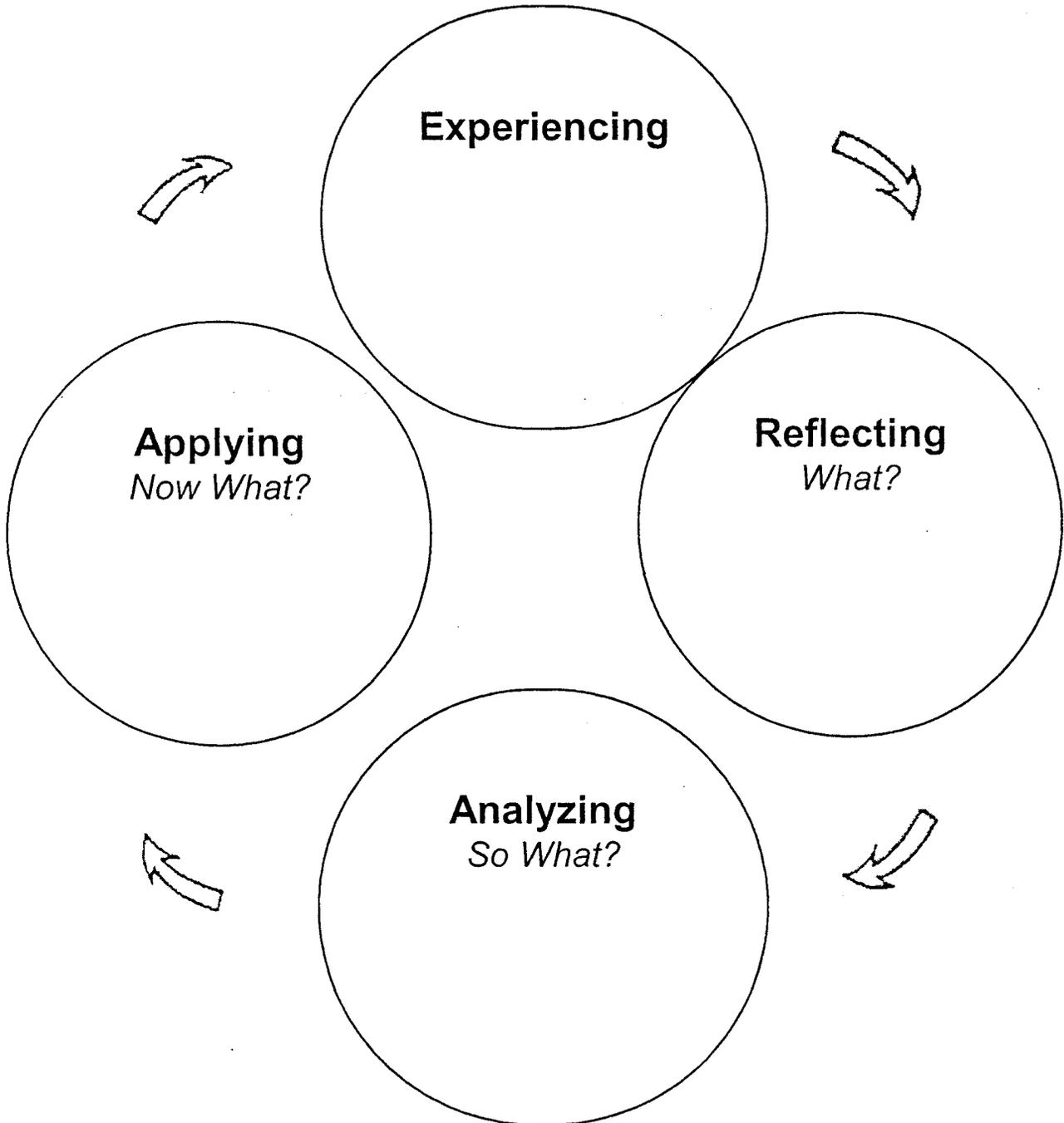
In designing the evaluation and closure portion of the lesson, active learner involvement continues to be critical to achieve the desired impact. Techniques which lead learners to summarize key points, review processes by which they learned, and come to a perception of the degree to which they have mastered the materials are essential in this part of the lesson.

Closure and evaluation give the trainer an opportunity for clarification of any questions, misperceptions or miscommunications as well as the reiteration of key points. It also provides time for the trainer to make connections between this lesson, previous learning and learning activities yet to come.

While the instructor makes summary comments, it is also helpful at this stage to ask each participant to summarize the learning experience for themselves. It is effective at this point to draw attention to the learning objectives as stated in the beginning of the lesson and compare those outcomes with perceptions of the learner's level of accomplishment, from the perspective of both the learner and the instructor.

Evaluation and closure is the time in the lesson where formal testing should be done if such a process is required or necessary. Effective use of this element of the instructional process provides a solid basis for continuing development and growth on the part of trainees.

The Learning Cycle

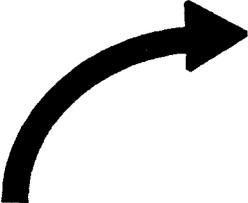


From "*The Trainer Type Inventory: Identifying Training Style Preferences*", Mardy Wheeler and Jeanie Marshall, *The 1986 Annual: Developing Human Resources*, p.87

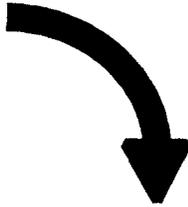


The Learning Cycle

① Experiencing
Why is first-hand
experience important?

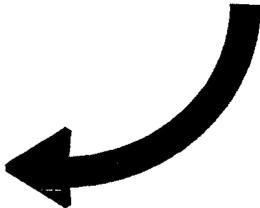


② Reflecting
Why is reflection
important?



④ Applying
Why is it important to
experiment and apply
new ideas?

③ Analyzing
Why is analysis
important?



Question Starters

Reflection:

- What did you see? Hear?
- Have you . . . ?
- When . . . ?
- Where . . . ?
- How did you . . . ?
- What happened when you . . . ?
- How did you feel when . . . ?
- What was it like to . . . ?
-
-
-

Analysis:

- What did you learn from . . . ?
- What was most interesting/valuable about . . . ?
- What stands out . . . ?
- Why do you think . . . ?
- What does this mean about . . . ?
- How does this compare/contrast to . . . ?
- How does this fit with your perspective (previous ideas) . . . ?
-
-
-

Application:

- How can you use . . . in your work?
- How could this affect you . . . ?
- What might your clients . . . ?
- What might help or hinder your using this . . . ?
-

**National Institute of Corrections
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Module 10

**DEVELOPING TRAINING BUDGETS FOR LEADERSHIP
DEVELOPMENT USING COST/BENEFIT ANALYSIS**

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Use a four (4) step process to determine the cost of a performance problem
- ▶ Analyze data about their organization that can be used to assess the cost of a training solution
- ▶ Compare internal delivery options with external delivery options
- ▶ Prepare a cost/benefit analysis for selected training strategies
- ▶ Make recommendations on how to proceed with developing the training program

ACTIVITY FOR CALCULATING THE COST OF A PERFORMANCE PROBLEM

Performance problem:

Questions to consider:

- ▶ How can this problem (or parts of this problem) be broken down into units?
- ▶ What part of the problem is most important to my stakeholders?
- ▶ What part of the problem can be easily measured (or estimated)?

Assumptions:

Formula:

1. Identify a single unit of defective performance _____
2. Calculate (or estimate) the cost of one unit _____
3. Count (or calculate) the number of defective units for one year _____
4. Multiply #2 by #3

A FORMULA FOR COMPUTING TRAINING PRODUCTION COSTS

<i>Item</i>	<i>Formula</i>	<i>Total</i>
Staff Costs:		
Salaries: Consulting Designing Conducting Evaluating	Number of people times median salary times number of hours on the project	_____
Travel: Transportation Lodging Meals Miscellaneous	Total from expense reports Allowable per diem rate X number of days X number of travelers	_____
Materials:	Actual cost if purchased: \$1,650-\$3,000 per minute to produce; \$45 to \$120 per ten minutes for prints.	_____
Film:		
Videotape	Prorated overhead from own studio, or rental rate plus operator salary, or staff salary median X number of hours	_____
Videodiscs	From \$35,000 to \$100,000 per hour	_____
Audiotapes	\$50-\$200 per minute to produce \$2.50 per print to duplicate \$5-\$10 for commercial products	_____
35mm Slides	\$15-\$50 per slide to produce 45 cents per print to duplicate	_____
Overhead Transparencies	\$30-\$100 to produce (includes artwork) 45¢-\$15 per print	_____
Artwork	Minimum of \$1.50 per square inch to create	_____
Manual and Materials	Local figures; public or in-house printshop quotations	_____
Announcements	Local figures needed here	_____
Special Equipment	Total purchase price	_____
	Total cost to produce the training program	\$ _____

CHECKLIST FOR ESTIMATING PERSONNEL COSTS

Do you have the internal capacity to develop the program?	YES	NO
Have you determined.....	Time	Cost
How much time is needed to conduct the needs analysis and training requirements analysis for the course/program?		
How many hours will it take to formulate the objectives and "tests" for the course?		

<p>How many hours will it take to:</p> <ul style="list-style-type: none"> ▶ Determine the format for materials? ▶ Write reference materials? ▶ Write job aids? ▶ Write evaluation materials? ▶ Write student guides and workbooks? ▶ Write the instructor/administrator guide? ▶ Proofread and edit materials? ▶ Review materials with managers, subject-matter experts and so forth? ▶ Pilot and Rewrite ▶ ▶ ▶ ▶ 		
<p>How many people will be needed to work on these activities?</p>		

GUIDE TO COMPUTING PREPARATION TIME FOR TRAINERS

If the format is	Then figure this many hours of production for each hour or presentation
Technical formal courses	5 to 15
Self-contained for hand-off to other instructors	50 to 100
Conventional management development	20 to 30
Programmed instruction	80 to 120
Technical on-site	1 to 3
Computer-assisted instruction	Up to 350

Does this course last	Then for each class hour, budget this many preparation hours
5 days or less?	3 hours preparation for 1 teaching hour
Between 5 and 10 days?	2.5 hours preparation for 1 teaching hour
Over 10 days?	2 hours preparation per hour of teaching

If the methods are	Then for each class hour, budget this many preparation hours
A tell-and-show by instructor	5 to 10
Mediated tell-and-show	1 (to preview the program)
Group discussion	Less than 1
Action or experiential	1.5 (The instructor should do the role-plays, games, or whatever; then analyze the probable dynamics.)

GUIDE TO COMPUTING PREPARATION TIME FOR TRAINERS

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Group discussion	Less than 1
Action or experiential	1.5 (The instructor should do the role-plays, games, or whatever; then analyze the probable dynamics.)

CALCULATING BENEFITS

Time Cost Avoidance

To calculate costs avoided due to saved time, multiply the time saved times the full cost of the employees involved.

For instance, to figure the costs avoided by training that has eliminated a weekly one-hour meeting for ten employees earning \$43.25 an hour:

- ▶ Multiply the number of employees by the hourly salary (10 employees X \$43.25 per hour = \$432.50).
- ▶ Multiply that figure by the number of meetings a year to compute the annual savings (\$432.50 per hour X 50 weeks = \$21,625 per year)

Increased Productivity

Note that time saved is not the same as money saved. Eliminating meetings is not the same as eliminating salaries. Rather, eliminating meetings frees those employees for other productive activities. Hence, time saved increases productivity. It may eventually serve to reduce operating costs if that improved productivity leads to staff reductions - in which case, salaries would actually be eliminated.

Materials Cost Avoidance

To calculate the cost of materials saved as the result of training to improve quality control, inventory control, and/or materials handling:

- ▶ Multiply the number of units saved per specified period (days, weeks, months, or years) times the cost per unit. (1,000 units saved per year X \$1,000 = \$1,000,000.)

CALCULATING BENEFITS (Cont.)

Equipment Cost Avoidance

To calculate increased equipment use or reduction of downtime:

- ▶ Determine the dollar value of equipment time by dividing the equipment cost by the number of hours it is used. (\$3 million computer system with a useful life of 5 years; \$600,000 a year = equipment cost. System is used 20 hours a week, or 1,040 hours a year. $\$600,000 \div 1,040 = \577 per hour equipment value.)
- ▶ Determine the increased usage of the system by multiplying the hours of increased usage times the value of the equipment per hour (200 hours monthly increased usage X \$577 hourly equipment value = \$115,400 monthly savings).

Turnover Cost Avoidance

The costs of recruiting and training new people to replace those who leave are approximately equal to the direct salary of the departing employees. Training that reduces turnover can claim the dollar value of each person saved as a benefit. You can estimate this benefit as follows:

- ▶ Multiply the turnover rate times the total number of people in a given salary category or job description. (10 percent yearly turnover rate X 100 people @ \$30,000 salary = \$300,000).
- ▶ Find the dollar value saved by subtracting the anticipated percentage reduction in turnover. (1 percent yearly turnover reduction X 100 people @ \$30,000 salary = \$30,000 reduction).

People-Problem Cost Avoidance

The dollar value of any people-problem can be calculated using the following steps:

1. Identify the people-problem (for example, grievances, strikes, accidents.)
2. Determine all personnel involved in or affected by the problem.
3. Calculate the full cost of each employee per day (or hour, if appropriate). (See the previous section, "Costs", for how to calculate this expense.)
4. Find the total cost of labor created by the problem by multiplying the number of identified personnel times their cost per day (or hour) times the number of days (or hours).

CHECKLIST FOR ESTIMATING PERSONNEL COSTS

Do you have the internal capacity to develop the program?	YES	NO
Have you determined.....	Time	Cost
How much time is needed to conduct the needs analysis and training requirements analysis for the course/program?		
How many hours will it take to formulate the objectives and "tests" for the course?		
How many hours will it take to: <ul style="list-style-type: none"> ▶ Determine the format for materials? ▶ Write reference materials? ▶ Write job aids? ▶ Write evaluation materials? ▶ Write student guides and workbooks? ▶ Write the instructor/administrator guide? ▶ Proofread and edit materials? ▶ Review materials with managers, subject-matter experts and so forth? ▶ Pilot and Rewrite ▶ ▶ ▶ ▶ 		
How many people will be needed to work on these activities?		

LEVELS OF TRAINING EVALUATION

Level I - REACTION

How did participants react to the training?

In this stage of evaluation you ask questions to find out:

Advantages of using this level include:

Disadvantages of using this level as the *only* method of evaluation are:

Level II - KNOWLEDGE

What did the participants learn during the training?

In this stage of evaluation you use:

Advantages of using the level include:

Limitations of using this level as the highest level of evaluation include:

Level III - BEHAVIOR

How did participant's behavior change as a result of the training?

Some ways to evaluate behavior change are:

Advantages of using this level include:

Limitations of using this level of evaluation include:

Level IV - RESULTS

Was the problem solved?

How would you evaluate this level?:

Advantages of using the level include:

What are the limitations or barriers to this level of evaluation?

LEVEL 1 - EVALUATION STRATEGIES

REACTION

- ▶ This level of evaluation is sometimes referred to as a “happiness rating.” It examines the participants reactions to the training session.
- ▶ This level of evaluation may include a set of questions that the trainer has participants respond to at the end of the training or, in a week long training program, at the end of each day.
- ▶ The information you gain from Level I evaluation is limiting in terms of telling you if the performance objectives have been meet. It is valuable in that it gives you an idea of how the participants felt about the training.
- ▶ If you ask for feedback, you need to respond to it if appropriate. For example, if the participants tell you that they really need more frequent breaks, you need to provide this for them. If they say that the chairs are too hard, you might want to provide more opportunity for them to stand up and move about.

LEVEL II - EVALUATION STRATEGIES

KNOWLEDGE

- ▶ Level II evaluation strategies are designed to assess whether or not participants can demonstrate the knowledge or perform the tasks spelled out in the performance objective.
- ▶ Level II evaluation primarily tests cognitive skills. Some methods of Level II evaluation are testing and/or asking questions. You can use testing and questions during the training session as well as at the end of the session.
- ▶ To measure improvement that can be attributed to training, you need a baseline measure. This is a measure of the skills and knowledge the trainee had before the training session.
- ▶ Using Level II evaluation strategies during the training will help you know when to back up, repeat, or explain learning points in a different way.
- ▶ Using Level II evaluation strategies at the end of the training will let you know if participants have achieved the performance objectives.

LEVEL III - EVALUATION STRATEGIES

BEHAVIOR

- ▶ This level seeks to answer the questions, “Has the participant’s behavior changed on the job as a result of the training?” If the participant does use his or her new knowledge and skills on the job then a “transfer of learning” has occurred.
- ▶ A key point with Level III evaluation is that you are trying to assess changes in performance that are attributable to training. To be successful with Level III evaluation, you will need to collect baseline data to give you a complete picture of “before” and “after”.
- ▶ Level III evaluation strategies can help uncover barriers that prevent the training from being applied on the job.

LEVEL IV - EVALUATION STRATEGIES

RESULTS

- ▶ Level IV evaluation is interested in results. It measures the effect a training program has on the organization. Some examples are: Reduced employee turnover; reduced costs; improved quality; improved customer satisfaction; fewer complaints; and fewer grievances.
- ▶ This level answers the questions, "Has the problem been solved?" If the training was developed and conducted as a result of a problem that was identified, has this problem been solved as a result of the training? On the contrary, if the problem was not solved, it might not be because the training was poor or not needed. It may be due to a variety of other factors that would require further analysis.
- ▶ This level can also answer the question, "How much did the training cost?" This is sometimes referred to as ROI or "Return on Investment".

LEVEL III - EVALUATION STRATEGIES - BEHAVIOR

In your small group, answer the following questions. What are the strengths and limitations of each of the techniques listed by the large group? Flip chart your responses and select a spokesperson to discuss them with the large group.

STRENGTHS	LIMITATIONS
•	•
•	•
•	•
•	•
•	•
•	•

LEVEL III - EVALUATION STRATEGIES - RESULTS

In your small group, answer the following questions. What are possible barriers to each of these techniques? What are some strategies to get around these barriers related to the techniques listed on newsprint? Flip chart your responses and select a spokesperson to discuss them with the large group.

BARRIERS	STRATEGIES
•	•
•	•
•	•
•	•
•	•
•	•

THE COST BENEFIT ANALYSIS REPORT

Report Format

There is no one format that is right for all situations, (Your organization may already have a “Standard” format.) But there are some elements that such a report should contain.

Purpose of the Report

You should concisely state:

- For whom the analysis was done (person, organization, and so on)
- Why it was done (the perceived training need)
- Proposed target audience

Your Recommendation

State your recommended course of action. Include:

- Training solutions
- Non-training solutions (for example, job aid, feedback, change in job structure)
- Combination of training/non-training solutions

The Findings of the CBA

Briefly state the findings of the analysis:

- Cost of the problem to the company.
- Cause of the problem.
- Cost of the training solution.
- Cost of the non-training solution.
- Benefits to be gained if the proposed solution is implemented (or costs that will continue if no action is taken).

THE COST BENEFIT ANALYSIS REPORT (cont.)

Your Assumptions

If you made *significant* assumptions, they should be stated for evaluation by the decision maker(s).

For instance, if one of your assumptions was that, based on data furnished by product management, the company would make \$1 million in additional sales *because* of the requested training, you should state this — and probably include the source (person and/or organization).

Request to Proceed with/Terminate the Project

You should clearly ask for permission to proceed as planned, proceed with an altered plan, or terminate the project. (You may want to have a separate memo/letter for the decision maker(s) to sign authorizing your recommended course of action.)

Length of a CBA Report

The CBA report should be no longer than two pages (three *maximum*). If you feel the need to include some of your backup data, do so by using attachments. Attachments might include:

- Cost summary worksheets
- Benefits summary worksheets
- Sources of data
- More detailed statements of assumptions.

**National Institute of Corrections
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Module 11

**A BRIEF INTRODUCTION TO THE RESOURCE SECTION
OF YOUR MANUAL**

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Assess at least four outside resources that may be used as components of a leadership development training program and learn methods for accessing external resources

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Module 12

HOW TO EVALUATE AVAILABLE RESOURCES

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Compare and contrast different types of resources that may be used in a leadership development program
- ▶ Evaluate whether the resources will meet the needs of your organizations
- ▶ Calculate the cost of using outside resources
- ▶ Compare the costs of buying vs. building
- ▶ Prepare a final Cost/Benefit Analysis Report

Module 12: How to Evaluate Available Resources

Individual Assignment

1. Read the assigned management training module design.
2. Complete the *Checklist for Evaluating Training Materials* for the design.
3. Compare your assessment with those of the others in your group:
 - What differences did you find in your evaluations?

 - To what do you attribute the differences?

 - Would you change any of your answers after discussion with the group?

CHECKLIST FOR EVALUATING TRAINING MATERIALS

	Y	N	COMMENTS
<p>A.) Instructional Needs</p> <p>Stated goals and objectives? Congruent with agency? Specific competencies addressed? Learners' guide/participant manual? Instructor's manual? Test items/structured activities? Relevant practice? Feedback?</p> <p>_____</p> <p>_____</p>			
<p>B.) Can the materials be:</p> <p>Modified to meet organization need? Individually paced? Group paced? Used in traditional classroom? Used in a learning center? Used at home or in the library?</p> <p>_____</p> <p>_____</p>			
<p>C.) Organizations Resources</p> <p>Do materials require special instructor capabilities? Special equipment? Special instruments?</p> <p>_____</p>			
<p>D.) Costs</p> <p>Production? Course delivery? Evaluation?</p> <p>_____</p> <p>_____</p>			

COST/BENEFIT ANALYSIS REPORT FORM

Purpose of the Report

Your Recommendations

The Findings on the Costs and Benefits

Your Assumptions

Request to Proceed with your Recommendations

CHECKLIST FOR EVALUATING TRAINING MATERIALS

	Y	N	COMMENTS
<p>A.) Instructional Needs Stated goals and objectives? Congruent with agency? Specific competencies addressed? Learners' guide/participant manual? Instructor's manual? Test items/structured activities? Relevant practice? Feedback? _____ _____</p>			
<p>B.) Can the materials be: Modified to meet organization need? Individually paced? Group paced? Used in traditional classroom? Used in a learning center? Used at home or in the library? _____ _____</p>			
<p>C.) Organizations Resources Do materials require special instructor capabilities? Special equipment? Special instruments? _____ _____</p>			
<p>D.) Costs Production? Course delivery? Evaluation? _____ _____</p>			

COST/BENEFIT ANALYSIS REPORT FORM

Purpose of the Report

Your Recommendations

The Findings on the Costs and Benefits

Your Assumptions

Request to Proceed with your Recommendations

Module 12: How to Evaluate Available Resources

Group Assignment

Background: *The members of your group work together in a training unit. You are working on a leadership development program for 30 mid-level managers in your agency of 1000 employees. The agency's priorities for manager competency development are:*

- *Directing Others/Organization Skills*
- *Functional/Technical Job Skills, including creating a positive, rehabilitative environment for youth in their care*
- *Written Communication*
- *Team-Building Skills*
- *Motivating Others*
- *Managing Diversity*
- *Conflict Management*

As a group:

1. Review the assigned leadership training offering.
2. Complete the *Checklist for Evaluating Training Materials* for the design.
3. Discuss the costs and benefits of this offering in light of agency priorities (above).
4. Decide whether this offering should or should not become a part of your agency's Leadership Development program, and explain your reasoning.

CHECKLIST FOR EVALUATING TRAINING MATERIALS

	Y	N	COMMENTS
<p>A.) Instructional Needs</p> <p>Stated goals and objectives? Congruent with agency? Specific competencies addressed? Learners' guide/participant manual? Instructor's manual? Test items/structured activities? Relevant practice? Feedback?</p> <p>_____</p> <p>_____</p>			
<p>B.) Can the materials be:</p> <p>Modified to meet organization need? Individually paced? Group paced? Used in traditional classroom? Used in a learning center? Used at home or in the library?</p> <p>_____</p> <p>_____</p>			
<p>C.) Organizations Resources</p> <p>Do materials require special instructor capabilities? Special equipment? Special instruments?</p> <p>_____</p> <p>_____</p>			
<p>D.) Costs</p> <p>Production? Course delivery? Evaluation?</p> <p>_____</p> <p>_____</p>			

COST/BENEFIT ANALYSIS REPORT FORM

Purpose of the Report

Your Recommendations

The Findings on the Costs and Benefits

Your Assumptions

Request to Proceed with your Recommendations

**National Institute of Corrections
Academy Division**

Module 13

MARKETING YOUR LEADERSHIP DEVELOPMENT PROGRAM

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Explore potential reasons candidates may have for participating in leadership development programs
- ▶ Develop strategies for recruiting candidates to their programs

Marketing Worksheet

Competency(ies) addressed:

Development Program title:

Questions candidates might have:

Content to address in marketing efforts (e.g., time required, selection process, benefits, etc.):

Methods for reaching candidates (e.g., personal contacts, written/electronic, etc.)

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Academy Division**

Module 14

PREPARING FOR PARTICIPANT TEAM PRESENTATIONS

PERFORMANCE OBJECTIVES

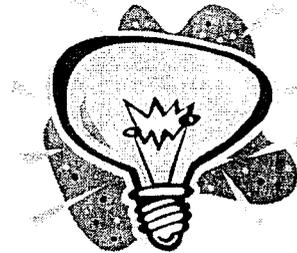
Participants will:

- ▶ Finalize their Action Plans
- ▶ Prepare to present their Team Action Plans

On Friday morning, your team will share your ideas with your peers

....

TEAM ACTION PLAN PRESENTATION



te

Please share the following regarding your team's ideas:

1. Current Situation
2. Goals/Vision
3. Short-term Objectives and Next Steps

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Module 15

TEAM ACTION PLAN PRESENTATIONS

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Present their Action Plans
- ▶ Receive feedback and suggestions from other participants and facilitators

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Module 16

TRAINING PROGRAM CLOSING ACTIVITIES

PERFORMANCE OBJECTIVES

Participants will:

- ▶ Share key learnings and insights from the training program
- ▶ Complete NIC training program feedback forms
- ▶ Celebrate the conclusion of the training program

RESOURCE SECTION

BIBLIOGRAPHY

American Telephone and Telegraph Company, in conjunction with Addison Wesley Training Systems, The Trainers Library, Addison Wesley, 1987.

This is a four volume compendium providing useful information about all aspects of training and development. Volume 2, Planning and Analysis has a very useful section on Cost Benefit Analysis.

Aspler, Carl; Hooper, Bill; and Oosterholt, Helen. Methods and Techniques of Training Needs Assessment and Organizational Diagnosis. Ontario Ministry of Correctional Services (Available free from the National Institute of Corrections Information Center (NICIC). June, 1985.

This booklet describes a number of methods and techniques for discovering training needs and diagnosing organizational problems, with details on who to do each effectively.

Block, Peter. Flawless Consulting: A Guide to Getting Your Expertise Used (2nd Edition). Jossey-Bass/Pfeiffer: 1999.

A classic for trainers and others who need to offer support, recommend strategies and provide expertise to decision-makers, either from within an organization or as an external consultant.

Boverie, Patricia E., Deanna Sanchez Mulcahy and John A. Zondlo. "Evaluating the Effectiveness of Training Programs", The 1994 Annual: Developing Human Resources. San Diego, CA: University Associates, Inc., 1994.

This is a survey article that covers a lot of ground in terms of evaluation. It is a useful overview for those of us who don't have time to read a book or take a course on the subject.

Bramley, Peter. Evaluating Training Effectiveness: Benchmarking Your Training Activity Against Best Practice. 2nd Edition. New York, NY: McGraw-Hill, 1996.

A revised and updated version of a popular book that helps the trainer and the training manager to benchmark stages in the training process against examples of sound practices and to compare beneficial changes with costs.

Carlisle, K. Analyzing Jobs and Tasks. Englewood Cliffs, NJ: Educational Technology Publications, 1986.

A how-to-book for performing job and task analysis. Technical and research oriented, this is an excellent reference.

Craig, Robert L. Editor. The ASTD Training and Development Handbook: A Guide to Human Resource Development. 4th Edition, New York, NY: McGraw-Hill, Inc. 1996.

A collection of 51 articles gathered from practitioners in the field. Examines the training function, design and development, media and methods, etc. Focuses on "bottom-line" aspects of improving human performance. A book you will consult often.

Eitington, Julius E. The Winning Trainer. 3rd Edition. Houston, TX: Gulf Publishing Co., 1996.

Excellent resource manual. This book has lots of examples of activities and strategies along with detailed explanations of how to use them. It guides trainers in designing in-basket exercises and case studies, on using video and even in structuring lectures. Every chapter has references and an annotated recommended reading list.

Filipczak, Bob. "Home Alone: Running the One Person Training Department". Training: The Human Side of Business. Minneapolis, MN: Lakewood Publications, 1993.

This article is full of advice for the training manager who is the whole training department. It has suggestions for scheduling, developing managers as trainers and seeking adequate funding for the training function.

Gaw, Beverly A. "Processing Questions: An Aid to Completing the Learning Cycle", The 1979 Annual Handbook for Group Facilitators. La Jolla, CA: University Associates, Inc. 1979.

An excellent article that contains numerous examples of processing questions for group activities that are arranged according to the cycle of experiential learning.

Head, Glenn E. Training Cost Analysis: A How-to Guide for Trainers and Managers. Alexandria, VA: American Society for Training and Development, 1994.

This book will help identify the costs of existing or proposed training programs. It provides a step by step process to review all cost factors, includes worksheets and case study.

Kaufmann, Roger. "When Good Bosses Ask for Bad Things", Training and Development Journal. Alexandria, VA: American Society for Training and Development, 1991.

An article that helps trainers determine what is a training problem and what is not.

Kay, Carol R., Sue K. Peyton and Robert Pike. "Diagnosing the Training Situation: Matching Instructional Techniques with Learning Outcomes and Environment, The 1987 Annual: Developing Human Resources. San Diego, CA: University Associates, 1987.

This article describes a process for looking closely at each training situation to apply specific criteria in selecting the appropriate strategies to target learning outcomes.

Kersley, Greg. Training and Technology: A Handbook for HRD Professionals. Reading, MA: Addison-Wesley Publishing Co., 1984.

A basic reference for new or experienced trainers, this book has chapters on various media that can be used to present information.

Kirkpatrick, Donald L. Evaluating Training Programs: The Four Levels. San Francisco, CA: Berrett-Koehler, 1994.

Designed for practitioners in the training field who plan, implement and evaluate training. This is the model of evaluation considered a classic by most trainers and managers. The book has guidelines and sample survey forms for each step of the process.

Laird, Dugan. Approaches to Training and Development. Rev. 2nd Edition. Reading, MA: Addison Wesley Publishing Co., Inc. 1985.

A superb all-around professional book. It covers all aspects of training and provides sound guidance.

Mager, Robert F. Measuring Instructional Results. 2nd Edition. Belmont, CA: Lake Publishing Company, 1984.

Any book by Mager is consider a classic in the field of performance improvement. This book focuses on the importance of clear objectives in measuring learning.

Mager, Robert F. and Peter Pipe. Analyzing Performance Problems. 2nd Edition. Belmont, CA: Lake Publishing Company, 1984.

This book is a classic for performance improvement. It takes you through a step by step flow-charted process for looking at any kind of work performance problem and determining the appropriate intervention (not always training).

Nolan, Thomas. The DACUM Process Training Manual. Cincinnati, OH: Cincinnati Technical College, 1990.

An original manual on the DACUM job/task analysis process, which uses storyboarding. Job profiles developed using this process are available from NICIC.

Murray, Margo with Marna A. Owen. Beyond the Myths and Magic of Mentoring: How to Facilitate an Effective Mentoring Program. San Francisco, CA: Jossey-Bass Inc., 1991.

This book provides a roadmap to developing and facilitating a mentoring program applicable to both private and public sector environments

Paddock, Susan C. Benchmarks for Management Training. Draft of a presentation to the American Society for Public Administration, San Antonio, TX: July, 1995. (Available free from NICIC).

Ms. Paddock offers 38 criteria for an effective management training program, or system, ranging from having an advisory board to evaluating cost savings to the agency as a result of training.

Quick, Thomas L. Training Manages So They Can Really Manage. Jossey-Bass Publishers, Inc., 1991.

This is an excellent how-to book for trainers who want to become effective internal consultants, as well as providing invaluable guidance to establishing quality management development programs.

Senge, P., R. Ross, S. Smith, C. Roberts, and A. Kleiner. The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization. New York, NY: Doubleday, 1994.

Although many find this 593 page guide a bit complex and philosophical, it is full of strategies to help organizations, teams and individuals increase their success by making it safer to take risks and make mistakes - and to learn from every effort.

Silberman, Mel. Active Training. 2nd Edition. San Diego, CA: University Associates, Inc., 1998.

This comprehensive handbook shows you how to design and conduct experiential programs. This edition has a wealth of new training exercise and case studies as well as a section that explores why adults learn best when actively engaged in the process.

Zaccarelli, Brother Herman E., C.S.C., Training Managers to Train. Menlo Park, CA: Crisp Publications, Inc. 1998.

This book states clearly and succinctly that training is an essential function of management and supervision and a skill that can be developed in non-trainers.

Zemke, Ron. "How to Do a Needs Assessment When You Think You Don't Have Time", Training. Minneapolis, MN: Lakewood Publications, March, 1998.

This article describes and recommends strategies for that all too common situation where management just wants some training, and they want it now (no time to wait for you to assess needs).

ASSESSMENT INSTRUMENTS (360°, PERSONALITY TYPE, LEARNING STYLES)

Jones, John E. Ph.D and William L. Bearley, Ed.D. 360° Feedback: Strategies and Techniques for Developing Leaders. Amherst, MA, HRD Press, and Minneapolis, MN, Lakewood Publications, 1996.

This is a practical handbook on using 360° assessments and feedback. It contains concrete methods for creating, adapting and using assessments to provide sharply targeted feedback to leaders.

The Center for Creative Leadership
One Leadership Place
PO Box 26300
Greensboro, NC 27438
336-245-2810
www.ccl.org

Leadership skills: Benchmarks (a 360° instrument using the 67 competencies and 19 derailers identified by CCL)
Managerial Effectiveness: SKILLSCOPE

Consulting Psychologists Press, Inc.
3803 Bayshore Rd.
Palo Alto, CA 94303
800-624-1765
www.myers-briggs.com

Myers-Briggs Type Indicator (MBTI) - personality type preference instrument
FIRO-B - Fundamental Interpersonal Relations Orientation Behavior

About Learning, Inc.
1251 N. Old Rand Road
Wauconda, IL 60084
800-822-4MAT
www.aboutlearning.com

Learning Type Measure - measures the differences in the ways people learn

Lominger Ltd., Inc.
5320 Cedar Lake Road South
Minneapolis, MN 55416
www.lominger.com

Voices 360 - 360° assessment using computer based instruments and responses
Leadership Architect Suite - tools used in identifying competencies and assessing levels of competence

Personnel Decisions International
2000 Plaza VII Tower
45 South Seventh Street
Minneapolis, MN 55402-1608
800-633-4410

Range of assessment instruments and management training modules for customization and delivery.

Pfeiffer & Co.
350 Sansome St., 5th Floor
San Francisco, CA 94104-1342
An Imprint of Jossey-Bass, Inc.
800-274-4434
www.pfeiffer.com

Leadership Practices Inventory (LPI) - assessment and analysis of leadership skills

COLLEGE AND UNIVERSITY BASED
MANAGEMENT DEVELOPMENT OFFERINGS

www.geocities.com/wheelerbric/ This site lists all major US and International Colleges and Universities that offer programs in management, supervision and leadership. This site also has links to other training resources.

WEB SITES

About Learning, Inc.

www.aboutlearning.com

About Learning, Inc. (Formerly Excel) is a training, consulting and publishing company that helps organizations improve the quality of their learning programs by teaching them to design more effective learning systems. About Learning offers books, software, training programs and training design consultation to a wide range of organizations to assist them in designing more effective training or instructional programs.

American Correctional Association (ACA)

4380 Forbes Boulevard

Lanham, MD 10706-4322

800-222-5646

www.corrections.com/aca

ACA is a multi-disciplinary organization of professionals representing all levels and facets of corrections and criminal justice. They offer a wide range of services, including many relevant to training and development, such as: certification programs for executives, managers, supervisors, and officers; self-instructional course; video-based training programs; videotapes; and publications.

American Society for Training and Development (ASTD)

1640 King Street

PO Box 1443

Alexandria, VA 22313-2043

703-683-8100

www.astd.org

ASTD is a membership organization whose mission is to provide leadership to individuals, organizations, and society to achieve work-related competence, performance and fulfillment. There is a wealth of training/management development related

products/services, research data, networking opportunities and access to Training and Development Magazine via this web site.

AskERIC

www.ericir.syr.edu

Educational Resources Information Center, a federally funded national information system that provides, through its 16 subject-specific clearinghouses, associated adjunct clearinghouses, and support components, a variety of services and products on a broad range of education-related issues. AskERIC is a personalized Internet-based service providing education information to teachers, librarians, counselors, administrators, parents, and others.

Jossey-Bass/Pfeiffer (see also Publishers)

www.pfeiffer.com

This web site provides links to at least 15 other sites for training and development professionals as well as a publications catalogue with titles on topics such as career and personal development; coaching and mentoring; communication skills; distance learning; games and activities; teams; presentation skills; and conflict resolution. This site also provides products/services for managers and leaders.

Justice Information Center

(A Service of the National Criminal Justice Reference Service)

www.ncjrs.org

This web site provides links to corrections, juvenile justice, and many other criminal justice organizations, and is one of the most extensive sources of information on criminal and juvenile justice.

Juvenile Justice Trainers Association (JJTA)

www.jjta.org

JJTA is the national association for training professionals from all juvenile justice disciplines. The web site provides information about available publications, curricula, and upcoming conferences/workshops of interest to juvenile justice trainers.

The National Council of Juvenile and Family Court Judges (NCJFCJ)
University of Nevada
1041 North Virginia Street
P. O. Box 8970
Reno, NV 89507
775-784-6012
www.ncjfcj.unr.edu

NCJFCJ is one of the most extensive sources of information on criminal and juvenile justice in the world, providing services to an international community of policymakers and professionals. From this site the user can link to sites for Corrections, Courts, Crime Prevention, Criminal Justice Statistics, Drugs and Crime, Juvenile Justice, Research and Evaluation and Victims.

National Institute of Corrections
www.bop.gov (click on National Institute of Corrections)

The National Institute of Corrections is a small agency within the US Department of Justice, Bureau of Prisons, that provides assistance to federal, state and local corrections agencies working with adult offenders. Through an interagency agreement with the Office of Juvenile Justice and Delinquency Prevention, NIC also provides training and technical assistance to state and local juvenile justice practitioners. NIC's training programs are primarily targeted to managers and leaders in corrections, while some of their programs also serve trainers in corrections and juvenile justice.

National Institute of Corrections Information Center (NICIC)
www.nicic.org

The primary purpose of the National Institute of Corrections Information Center is to provide personalized research assistance and disseminate documents to correctional policy makers, practitioners, elected officials and other interested in corrections issues. The Robert J. Kutak Memorial Library features over 15,000 titles. This web site provides access to numerous lesson plans in the field of adult and juvenile corrections, jails, and community corrections. Contributions of lesson plans are invited. This site has links to the National Institute of Corrections and to the National Institute of Corrections Academy.

National Juvenile Detention Association (NJDA)
301 Perkins Building/Eastern Kentucky University
521 Lancaster Avenue
Richmond, KY 40475-3102
606-622-6259
www.njda.com

NJDA exists to advance the science, processes and art of juvenile detention services through the overall improvement of the juvenile justice profession. NJDA delivers high quality training; disseminates publications; advocates for quality detention programs at the national, state and local levels; and reviews and establishes detention standards and practices.

Office of Juvenile Justice and Delinquency Prevention (OJJDP)
800-995-6423 (NIC East)
800-995-6429 (NIC West)
www.ojjdp.ncjrs.org

OJJDP's goal is to provide national leadership in addressing the issues of juvenile delinquency and improving juvenile justice. OJJDP sponsors a broad array of research, program, and training initiatives designed to improve the juvenile justice system as a whole, as well as to benefit youth-serving agencies. Technical assistance is available to juvenile justice agencies through OJJDP's various divisions. The web site provides guidance to practitioners on accessing the various programs and services.

Squarewheels - a Powerful Toolkit for Organizational Development
www.squarewheels.com

This organization is a source of team building exercises, team development resources, training tools and many other resources for active experiential learning, leadership and managing change. The web site offers numerous free materials and suggestions as well as links to many other excellent sites for trainers.

Training Forum
www.trainingforum.com

TrainingForum(TM), a division of Interactive Training, offers a comprehensive array of premium training products and services. They provide training news of best practices and provide links to many other organizations, publications, research data, and learning centers.

Training Magazine/Lakewood Publications
www.trainingsupersite.com

This site offers tutorials, free graphics, on line learning programs, access to articles from Training Magazine, to their newsletter with training tips, plus a "training superstore" for training products.

TRDEV-L Training and Development Home Page
www.train.ed.psu.edu/TRDEV-L

This site is a listserv discussion group for training and development - a forum for exchange of information and ideas about improving performance of people in organizations.

PUBLISHERS

About Learning, Inc.
1251 N. Old Rand Road
Wauconda, IL 60084
800-822-4MAT
www.aboutlearning.com

Creative Training Techniques Press
7620 West 78th Street
Minneapolis, MN 55439-2518
800-328-9210
www.cttbobpike.com

Crisp Publications, Inc.
1200 Hamilton Court
Menlo Park, CA 94025-1427
800-442-7427
www.crisp-pub.com

Jossey-Bass/Pfeiffer
350 Sansome Street - 5th Floor
San Francisco, CA 94104-9825
800-274-4434
www.pfeiffer.com

Lakewood Publications - Training Magazine
50 South 9th Street
Minneapolis, MN 55402
800-328-4329
www.trainingsupersite.com/lakewood/index.htm

The Trainers Warehouse
89 Washington Avenue
Natick, MA 01760
800-299-3770
www.trainerswarehouse.com

Workshops by Thiagi, Inc.
4423 E. Trailridge Road
Bloomington, IN 47408-9633
812-332-1478
800-996-7725
www.thiagi.com

The following organizations and association also offer a number of publications, videos, and lesson plans relevant to management development:

American Correctional Association
American Society for Training and Development
Juvenile Justice Trainers Association
National Institute of Corrections Information Center
National Juvenile Detention Association

COSTS ASSOCIATED WITH TRAINING PROJECT

	1	2	3	4
I. Personnel				
Salary	_____	_____	_____	_____
Wages	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
II. Materials				
AV's - OH's	_____	_____	_____	_____
Markers	_____	_____	_____	_____
Notebooks	_____	_____	_____	_____
Software	_____	_____	_____	_____
Special Equipment	_____	_____	_____	_____
Other	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
II. Support				
Word Processing	_____	_____	_____	_____
Programming	_____	_____	_____	_____
Graphic Arts	_____	_____	_____	_____
Reproduction	_____	_____	_____	_____
Clerical Assistance	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
III. Delivering				
Instructor Salary	_____	_____	_____	_____
Travel, Meals	_____	_____	_____	_____
Facility/Space	_____	_____	_____	_____
AV-Equipment	_____	_____	_____	_____
Consultant	_____	_____	_____	_____

