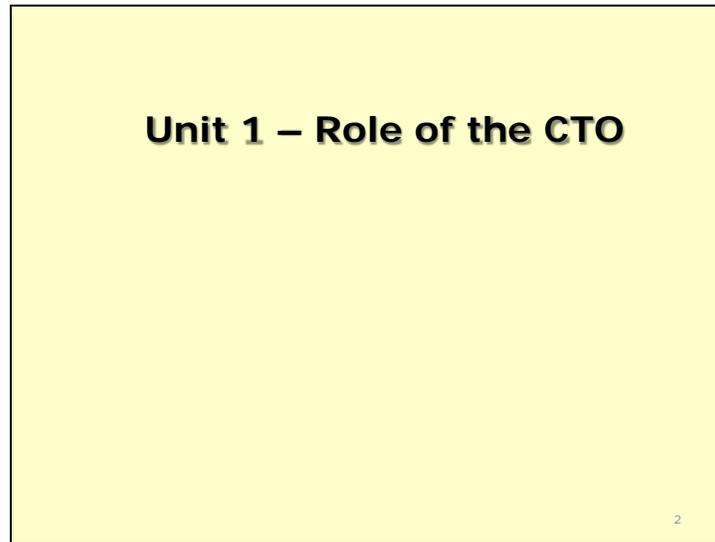


Communications Training Officer 2014 Revised



Slide 2



Unit 1 Role of the CTO

Learning Expectations for Unit 1

At the end of the course, the student will be able to:

- **Identify four reasons for training**
- **Explain the general roles of the CTO program in training new employees**
- **Describe the role of the CTO and Trainee**
- **Describe the characteristics of a good trainer – trainee relationship**
- **Describe general philosophical differences between the San Jose & ATM/Reno models**

We have a couple of different training models to use. Many of you are using the San Jose model. This is the model that APCO uses. It involves the use of Standard Evaluation Guideline statements and daily observation reports.

The other model that may be used is the Reno or COPS model. In this state we instruct it in CTO2 as the Adult Training Model- which is a modified Reno model. It uses identified competencies, phases of training, and performance statements.

Slide 3

| Tale of 2 Models | |
|---|---|
| San Jose | ATM/Reno |
| <ul style="list-style-type: none">• Based on reward & consequences models• CTO-centered• CTO is limited supervisor• CTO evaluates• Anchored rating system<ul style="list-style-type: none">– Subjective by nature• Agency can look at the “numbers” to determine trainee success | <ul style="list-style-type: none">• Based on current adult learning methods and theory• Trainee-centered<ul style="list-style-type: none">– Trainee is responsible for his own learning• CTO is a coach, guide, & mentor• A separate CTO does formal evaluation twice during the training period• Uses multiple methods to evaluate and determine success |

We are going to include a discussion throughout this course, of the 2 different models in use in Washington State for training Telecommunicators.

The model most of you are familiar with is the San Jose Model. Created in the 60's this model works with the concept that an anchored rating system will show you where a trainee is on the *required (minimum) performance* scale on any day.

The San Jose model allows for comments or notes to be added as part of the daily report. As a trainer working within this model, you are a limited supervisor. In that, you direct the work actions of the trainee and you have significant power over them. While individual trainers may be more egalitarian, this model is predicated on the premise that “I tell you what to do and how to do it, and you are expected to do it that way”. Think about times when you have heard from trainees that they have been shown or told a different way to do something by another trainer? What types of conflict or difficulty has it caused for you, if not for you, for the trainee?

CTOs in this model are expected to evaluate the trainee daily through the use of DOR/SEGs. Typically, they use an anchored rating system which is based upon a goal toward an “acceptable” rating-which means the trainee can be released on that position. Often, CTOs are asked for their recommendations about the future of the trainee. Should they move forward? Should they have remedial/extended training, and in some cases, should they be terminated?

In the Adult Training Model based upon the Reno Model, there are some significant differences: *The trainer is a coach, a guide, and a mentor* to the new employee

The trainer does not evaluate in the conventional way- the trainer keeps a journal noting objective observations of performance, details of methods used to deliver the information, and discussions, feedback, etc. that occurred during the shift. In this model, *a separate CTO* provides a detailed evaluation twice during the training period, once mid-way through the one-on-one training and again at the end. The CTO used to conduct this evaluation is not the primary trainer. Likewise, the trainer reads and comments in the trainee's reflective journal. The CTO also comments on the Weekly Coaching Report completed by the trainee.

- *The trainer provides performance feedback and guidance.*
- *The trainer is a role model and resource.*

Slide 4

Trainer/Trainee Relationship

- Mutual Trust & Respect
- Realistic & Clear Expectations
- Supporting
- Encouraging
- Professional

4

Mutual Trust and Respect: The trainee must trust that the CTO is working with them to reach the goal. If the trainee cannot or does not trust the CTO, a negative training environment will exist. Trust is built on confidentiality and truthfulness. Don't talk about the trainee to unauthorized parties. Be truthful toward the trainee about their progress and your reports.

Realistic and Clear Expectations: Communicate your expectations, but be careful that they are not unrealistic. A tested training program will set realistic milestones and time-lines. Don't expect more. Be aware that some trainees will move very quickly through one area of training, but move slowly through another.

Supporting: In all arenas. This can be a complex job to learn to deal with as well as to perform in. Be aware of the trainee emotional and psychological needs as well as those dealing with knowledge and skills. In the WA Comm Adult Training Model (Reno) the focus of the CTO is on supporting, mentoring, coaching and guiding the trainee.

Encouraging: A CTO that sincerely wants their trainee to succeed will positively reinforce and encourage their behavior whenever possible.

Professional: A CTO in the San Jose model is in some ways the immediate supervisor of the trainee. It is important that you remain professional in your relationship in order to succeed in fairly evaluating, correcting, and counseling a trainee.

Proper: creates a positive, open training environment where the trainee will feel comfortable in discussing their needs and problems.

Student Centered – Rather than the traditional "Instructor-centered" training environment, the student center is putting the trainee's interests first. Allowing the trainee to be an active agent in their learning, they corroborate Carl Roger's theory that "the only learning which significantly influences behavior is self-discovered." In the ATM model, student-centered learning is the focus of the model. It is less so in the San Jose Model.

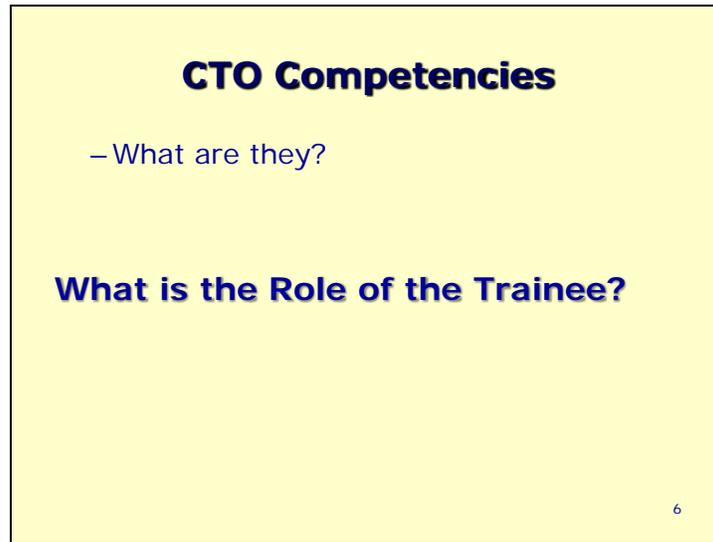
Slide 5



- George meets standards at the acceptable level
- A Trainee who meets the acceptable level of performance is ready to be released
- If George performs less than the *stated* standard, and is allowed to perform at that level with no intervention, he then becomes the standard
 - It is implied that if George is still allowed to remain an employee, he must be meeting the standard, even if he makes no further improvement. He does nothing 'above and beyond' the requirements of the position.
- Meeting the standard does not mean that George is a "bad" employee.
- Minimal does not mean **unacceptable**, it is the **acceptable standard** or adequate performance
- Most agencies will have at least one 'George', someone who operates at the minimum acceptable standard.
 - In reality, the majority of employees will be at the "George" level of performance. If the vast majority of employees are at a significantly higher performance level than "George", then the agency should consider whether their "George" is an acceptable performance, or if the performance of the majority constitutes the new George-or acceptable performance level.
- In the Reno model, the milestones provide guidance on whether your trainee is "George" for the point you are at in training and provides additional information on how a trainee can exceed standards at any point, allowing for self-direction.

Taking it out of the context of your work values, what does your life look like in regards to "exceed expectations?" What time did you get to class? What actions did you take today (exercise, floss, healthy diet, etc.)? Where on the scale of meeting an acceptable standard do you fall in terms of your life in general? What would "exceed" a life-standard look like?

Slide 6



CTO Competencies

– What are they?

What is the Role of the Trainee?

6

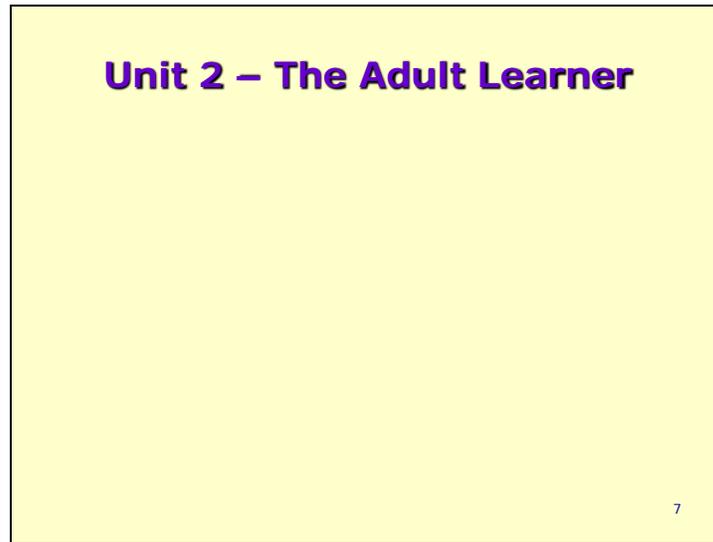
We've talked about George, now let's talk about you. Let's take a look at CTO **competencies**. A competency is a set of defined behaviors that provide a structured guide enabling the identification, evaluation, and development of the behaviors in individual employees.

In other words, these are the big parts of a job that can be identified and evaluated and where you can be develop to acquire the behaviors and skills needed to show competence in that area.

CTO Competencies Activity (2)

We want you to take the next **10 minutes** in your group and create a list of competencies for CTOs. What are the BIG parts of the training job that can be identified, evaluated, and learned?

Slide 7



Unit 2 - The Adult Learner

Learning Expectations for Unit 2:

At the end of the course the student will be able to:

- **Explain Knowles Adult Learning Principles**
- **SMORE (Self-Assessment, Motivation, Ownership, Readiness, Experience)**
 - **Describe Bloom’s Taxonomy of Learning Domains**
 - **Describe Bloom’s affective levels (receiving, responding, valuing, organizing, characterizing)**
 - **Describe Bloom’s cognitive levels and performance each represents**
 - **Describe the characteristics of the three learning intake styles: Auditory, Visual, and Kinesthetic**
- **Describe the “Feedback Model” used in this course**
- **List the three Key Features of Working Memory**
- **Describe the differences between the San Jose and Reno/Adult Training Models**
- **Describe the ways in which long-term memory and automaticity works**
 - **Describe the four key processes in GROUNDED BRAIN TEACHING (Gain Attention, Processing in working memory, Management of mental load, and Retrieval from long-term memory)**
- **List the three parts of the feedback model described in this course**
- **List the three learning domains in Bloom’s Taxonomy**
 - **Describe the levels within the Cognitive and Affective domain where trainees may typically be released from training**
- **Describe, in general terms, how behavior is best documented**

Slide 8

**Adult Learning Principles:
SMORES**

Self – Assessment

- Why, What, How

Motivation to Learn

- Intrinsic
- Personal payoff

Orientation to Learning

- *Problem-centered*
- *Contextual real-life issues*

8

As CTOs you are responsible for training new hires. Some of you may also do some remedial training for the agency. As such, you will be training adults.

There are significant differences in the way we approach the delivery of information with adult learners. There are “rules” if you would call them that, about why and how adults take in and use information. Malcolm Knowles (1913-1997) authored “The Adult Learner”¹ and is considered one of the preeminent authorities on adult learning. He developed six main points on his Andragogical Model. We have paraphrased them here.

We are going to start with an acronym: SMORES

1. **Self- Assessment** - Learner’s need to know:
 - a. Why
 - b. What
 - c. How
2. **Motivation to Learn**
 - a. Intrinsic
 - b. Personal payoff
3. **Orientation to Learning**
 - a. Problem-centered
 - b. Contextual
4. **Readiness to Learn**
 - a. Life related
 - b. Developmental task
5. **Experience of the Learner**
 - a. Resource
 - b. Mental models
6. **Self-Concept/Self- Directed Learner**
 - a. Autonomous
 - b. Self-directing

¹ Malcolm Knowles- *The Adult Learner*

1. Self-Assessment – The Need to Know

As adult learners, we want to know WHY we need to know something before we learn it. Your trainees will want to know why they need to understand and comply with the order in which they ask questions when interviewing a caller. We expect them to learn it, but we also need for them to understand *why* they need to know it and why it is important. Most of your trainees will have had some sort of front-loading done, whether in an academy or through individual instruction on certain aspects of the job prior to them coming to you. This is where introducing them to the WHY is important. Their assessment of their need to understand the relevancy of the new learning sets up the foundation upon which to build knowledge.

It is important for them to explore the gap between what they currently know and where they want to be. Asking clarifying questions of your trainee is an excellent way to get them to assess that gap. When they understand where they are, they can set goals to get to where they want to be. As a role model, you ARE the goal of where they want to be. You will be demonstrating that on a daily basis.

2. Motivation – To Learn

The biggest motivators to learning for adults are intrinsic. Intrinsic motivators include job satisfaction, self-esteem, quality of life, and the ability to continue to grow and develop. External motivators or extrinsic motivation include promotion, increased salary, etc. .

3. Orientation – To Learning

Adults are life-centered or problem-centered. They understand that learning will help them perform better. They acquire new knowledge, attitudes, skills, and values most effectively when the learning is presented in a way that incorporates real-life or work situations.

As CTOs think about how you are presenting new material and learning components to your trainees. Consider things such as how soon learner should use the new information.

Slide 9

**Adult Learning Principles:
SMORES**

Readiness to Learn

- Life-related
- Developmental task

Experience of the Learner

- Resource
- Mental Models

Self-Concept, Self- Directed Learner

- *Autonomous*
- *Self-Directing*

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4. Readiness - To Learn

Adults become ready to learn those things they need to know in order to manage the real-life events or situations. Developmental tasks that are connected with moving from doing one thing to something more advanced especially rely on readiness to learn. Each successful phase of learning is preceded by a “readiness” to learn what will be required in that next phase.

Some of the ways you can help to induce readiness in a trainee is through the use of simulations, role plays, modeling superior performance, and counseling.

Think of ways that induce readiness:

5. Experience - Prior Experience the Learner Brings into the New Training Situation

Your trainees come to you with a wide variety of experience. More than children or youths, adults have varied life and professional experience which they bring into the new workplace. An important aspect of this to understand is that adult learners view and define who they are by their experiences. When their experience is devalued in the new work environment, it feels to them that you are not rejecting the experiences they bring with them, but that you are rejecting them as people.

One of the facts that come with a trainee with life experience is that some of the accumulated experience includes habits, biases, and assumptions that may be problematic in the new job. It will be your job as trainers to work on opening up their minds to alternate ways of thinking and doing things. It is one the reasons that role-modeling and tying training back to the agency’s stated vision, values, and mission statements is so important. You aren’t just training good telecommunicators, you are training good employees. You are working with individuals to allow them to look at previously held beliefs or attitudes, and change them as warranted in the new workplace.

For many types of learning, the most valuable resources are within the adult learner themselves. It is why experiential training becomes so important. It allows the trainee to tap into their reserves of experience and understanding to apply it in the new job. Group discussions, case studies, simulations, and problem-solving activities are all successful methods to help a trainee move previous experience and understanding into a new job context.

6. Self-Directed/Self-Concept

Adults may have preconceived concerns about “training” or education, which as children was built upon dependency. Adults learn best as self-directed learners who are engaged in their learning experience. They have a deep need to be seen by others as being self-directed and capable individuals. They resent and resist having others impose their learning or “what’s important” on them. Learning a new job is part of a life-choice. Their self-concept in success or failure of the new venture is tied to their willingness to “choose” (i.e., self-direct) this new workplace or profession. Successful trainers encourage self-directed learning. There is no need to be the “font of all knowledge” with adults. It takes planning and initiative on the part of the effective trainer to find ways in which to allow the trainee to help in setting goals and direction for their learning.

Carl Rogers² Learner-Centered Learning

American psychologist, Carl Rogers (1902-1987) had the following five hypotheses regarding learner-centered education:

“A person cannot teach another person directly; a person can only facilitate another’s learning” (Rogers, 1951). This is a result of his personality theory, which states that everyone exists in a constantly changing world of experience in which he or she is the center. Each person reacts and responds based on perception and experience. The belief is that what the student does is more important than what the teacher does. The focus is on the student (Rogers, 1951). Therefore, the background and experiences of the learner are essential to how and what is learned. Each student will process what he or she learns differently depending on what he or she brings to the classroom.

“A person learns significantly only those things that are perceived as being involved in the maintenance of or enhancement of the structure of self” (Rogers, 1951). Therefore, relevancy to the student is essential for learning. The students’ experiences become the core of the course.

“Experience which, if assimilated, would involve a change in the organization of self, tends to be resisted through denial or distortion of symbolism” (Rogers, 1951). If the content or presentation of a course is inconsistent with preconceived information, the student will learn if he or she is open to varying concepts. Being open to consider concepts that vary from one’s own is vital to learning. Therefore, gently encouraging open-mindedness is helpful in engaging the student in learning. Also, it is important, for this reason, that new information be relevant and related to existing experience.

“The structure and organization of self appears to become more rigid under threats and to relax its boundaries when completely free from threat” (Rogers, 1951). If students believe that concepts are being forced upon them, they might become uncomfortable and fearful. A barrier is created by a tone of threat in the classroom. Therefore, an open, friendly environment in which trust is developed is essential in the classroom. Fear of retribution for not agreeing with a concept should be eliminated. A classroom tone of support helps to alleviate fears and encourages students to have the courage to explore concepts and beliefs that vary from those they bring to the classroom. Also, new information might threaten the student’s concept of him- or herself; therefore, the less vulnerable the student feels, the more likely he or she will be able to open up to the learning process.

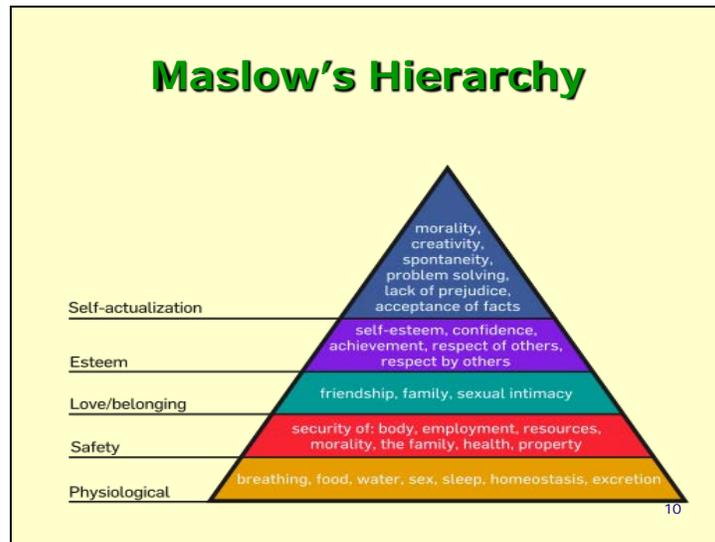
“The educational situation which most effectively promotes significant learning is one in which (a) threat to the self of the learner is reduced to a minimum and (b) differentiated perception of the field is facilitated” (Rogers, 1951). The instructor should be open to learning from the students and also working to connect the students to the subject matter. Frequent interaction with the students will help achieve this goal. The instructor’s

² Carl Rogers – *Learning Centered Teaching*

acceptance of being a mentor who guides rather than the expert who tells is instrumental to student-centered, nonthreatening, and unforced learning.

In looking at Rogers' learner or student-centered education beliefs, we can see a clear delineation between the philosophies of the San Jose and Reno Models.

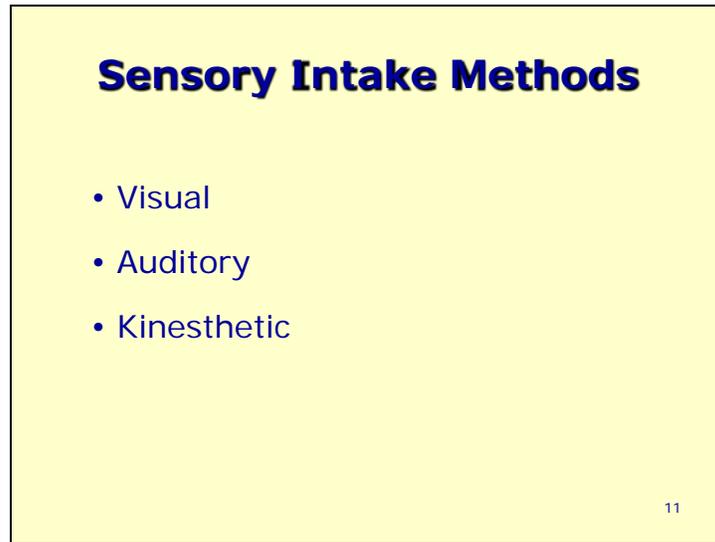
Slide 10



Maslow's Hierarchy of Needs

Adding to this, the work of Abraham Maslow (1908-1970), an American psychologist who postulated a theory of psychological health based upon the fulfillment of innate human needs. Maslow's Hierarchy of Needs has, in recent years, been said to represent primarily Western values and ideologies and is now viewed as such by cultural psychologists. This information is to provide a foundation of understanding human needs in order to identify barriers. As you can see on the unit objectives, this is not a required piece of information, but rather background to provide meaning for the remainder of this unit.

Slide 11



Sensory Intake Methods

- Visual
- Auditory
- Kinesthetic

11

Senses and Learning

Learners learn better when multiple senses are stimulated. They need active participation and practice to learn best. Instructional methods that change the pace and activities that encourage interaction will help to stimulate. Use a variety of strong, vivid visuals, audiotapes, videos, pictures, and props – three-dimensional items the students can touch, feel, take apart, and put together.

Generally, people prefer to learn (receive information) visually. New research says we are all visual learners. The three main ways of taking in information are:

Visual
Auditory
Kinesthetic

Recent research confirms: ***ALL LEARNERS ARE VISUAL LEARNERS.***

Learners take in information through their eyes. They read material, or viewing text and graphics. What they see, they can learn. Learners are spatially aware, notice details, and can visualize (on their minds-eye).

Learners take in information through their ears. They listen to instructors, and may talk themselves, while receiving information in other ways, so they can hear it said. What they hear, they can learn. Learners use beat and rhythm to organize material, read out loud, can follow oral directions.

Learners take in information through touch and movement. They may do something physical while learning. They may use their hands or bodies while learning – and not necessarily in an activity that matches the content. For example, while learning cognitive material (facts, concepts, lists) the student may need to knit or doodle to help them place the information into memory, or, they make takes notes (writing) or highlight text information. When they ‘do’, they learn. Many adult learners have excellent mechanical skills, use large gestures, and want to touch props and equipment.

In some subject matters, people will also use their other senses, taste, and smell. For example, a wine connoisseur may actually learn much from taste and smell; a wine course may use these senses as well as the others.

For many years, professional trainers believed most people have one primary learning preference, but use all three common styles to some extent. These Learning Styles are also called Learning Modalities and Learning Preferences. However recent research has debunked the learning style preference. ALL learners are essentially *visual learners*, but the research shows that people use all their senses to learn. When tested using the candidates “preferred” method, research found no appreciable increase in learning from one learning “style” preference to another.

Here are ways in which the senses can be stimulated during training:

Visual Intake

Since all (seeing) learners take in material using their eyes, they learn when presented with written materials, or when spoken material is supported with visual material (pictures, graphs, diagrams, demonstrations). Visual intake is critical when introducing new learning. Visual intake is particularly effective when introducing new learning. Graphics (photos, pictures, etc.) plus explanatory text may also improve retention.

Auditory Intake

Learners absorb information through hearing material. Material given in written form should also be explained out loud. Allow the learner to repeat or verbalize information as necessary. Methods that allow the learner to participate verbally and listen to others who are participating work well.

A learning theory called Grounded-Brain Teaching cites research that shows when information is delivered both visually and auditorily (Dual Channels) learning is increased.

Kinesthetic Intake

Because they prefer to receive information through touch and movement, methods that allow motion work best with kinesthetic learners. They want to be physically involved.

While we often think field trips, tours and ride-a-longs are not ‘real’ training, they put the kinesthetic learner into the process. For example, they may learn more about apparatus by touring a station than a discussion of or pictures of the apparatus can teach. By walking around and touching the apparatus, they become physically involved in the activity.

Be aware that props can become a distraction to your intended lesson unless used carefully. For example, if you leave a physical item you will be working with later on the desk while explaining other unrelated material, the learner’s attention may be focused on the item more than the lesson at hand. Instead, use props while explaining their use. Put them away when they are no longer relevant to the learning session.

To keep learners engaged, interested, and stimulated, effective trainers will incorporate all three intake methods in their lessons.

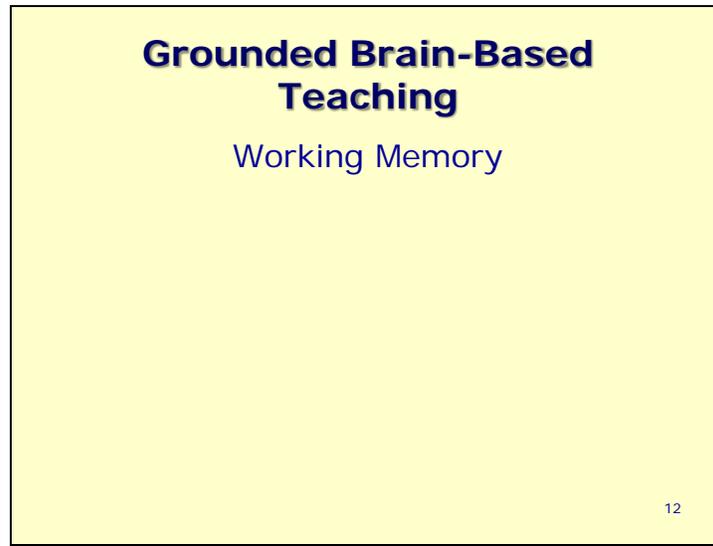
“The more of the learner’s sense we engage in organized and meaningful ways, the more easily learning can occur”.³

³ ©2011 - Telling Ain’t Training American Society of Training & Development, Harold D. Stolovitch, and Erica J. Keeps-ASTD Press

Learners learn better when multiple senses are stimulated. They need active participation and practice to learn best. Instructional methods that change the pace and activities that encourage interaction will help to stimulate. Use a variety of strong, vivid visuals, audiotapes, videos, pictures, and props – three-dimensional items the students can touch, feel, take apart, and put together.

The bottom line: mix up your training activities and delivery methods. Use all three methods, auditory, kinesthetic, and visual to stimulate the learning session. Do not cater to one preferred method, instead, use them all!

Slide 12



Grounded Brain-Based Teaching

*Excerpted from Evidence-Based Teaching Methods-
A Guide for Training Professionals, Ruth Colvin Clark*

40 people drove a car in a simulator under 4 conditions:

- No distractions
- Cell phone-hand held
- Cell phone hands-free
- Intoxicated to a .08 BA

On a simulated freeway, a pace car braked 32 times during a 10 mile trip.

- 3 participants collided into the pace car
- They were the hands-free and the hand-held cell phone users
- None of the drunk drivers collided

This research shows the fragility of the human brain and the severe processing limits that affect all mental achievements.

We are going to look at the psychology of learning and how to introduce instructional accommodations to leverage the strengths and weaknesses of our learner's brain.

An area of note which will require some course modification is that there is little science to support a literal right- and left-brain distinction. There may be some useful application to the idea of more logical (left-brained) vs. more divergent (right-brained) approaches to tasks, however.

List A

1. House
2. Computer
3. Bird
4. Cloud
5. Scissors
6. Book
7. Dress
8. Marker
9. Bedroom
10. Chair
11. Calendar
12. Pink
13. Ocean
14. Gutter
15. Asia

Instructor: Follow the directions for list A.

List B

1. Ethics
2. Hire
3. Terse
4. Noun
5. Problem
6. Manage
7. Design
8. Retro
9. First
10. Solution
11. Color
12. Liquid
13. Pattern
14. Basic
15. Account

From which list did you recall the most words? Why?

- List A has shorter words than List B
- List A has more concrete words than List B
- List A has more verbs than list B

Where did the most frequently remembered words come from, the start, the middle, or the end of the list?

The results reveal three key features of our working memory, the memory that is both the engine and the bottleneck of learning.

Slide 13

| Working Memory – Key Features | | |
|--------------------------------------|---|---|
| Feature | Description | What It Means |
| <i>Active processor</i> | Working memory is the conscious part of your brain that thinks, solves problems, and learns. | Trainers must engage working memory for learning to occur. |
| <i>Capacity Limits</i> | Working memory can only hold a few items at one time. When working memory fills, its processing capabilities slow down. | Trainers must avoid overloading working memory for learning to occur. |
| <i>Dual Channel</i> | Working memory has a separate area for storing visual and auditory information | Trainers can extend working memory capacity by using visual and auditory components |

13

Feature 1 – Active Processor

- Working memory is an active processor
- It is the conscious part of the brain
 - That thinks
 - That solves problems
 - That learns
- It was the active processing of the words you read that led you to recalling them later
- The words you did not recall did not receive sufficient processing for learning

Feature 2 – Capacity Limits

Did anyone recall all of the words on either list?

- Working memory has several restrictions on how much info it can hold
 - It is even more limited when working memory is processing
- Recent estimates set a limit of around 3-6 items when working memory must also be actively engaged in other activities
- You recalled more words at the beginning of the lists because your working memory had capacity to process the initial words
 - When you added more words the processing capacity was soon exceeded.
 - As each new word entered memory, it replaced an older word with little opportunity for processing
 - You may have recalled more of the last words on the list if you wrote them down right away
 - These words were still active in working memory when you finished and were not replaced by more words

Feature 3 – Dual Channels

The dual channels feature refer to the fact that working memory has a center for storing and processing auditory information and a separate center for visual info. However, if the information being trained has an auditory and visual component, our brains are encoding it in two locations to allow for that information to be better stored in our long term memory. For example; 1st/Main Street

intersection and its unique location characteristics can be dual coded if I have a clear picture of that location. Concrete terms versus abstract are more memorable.

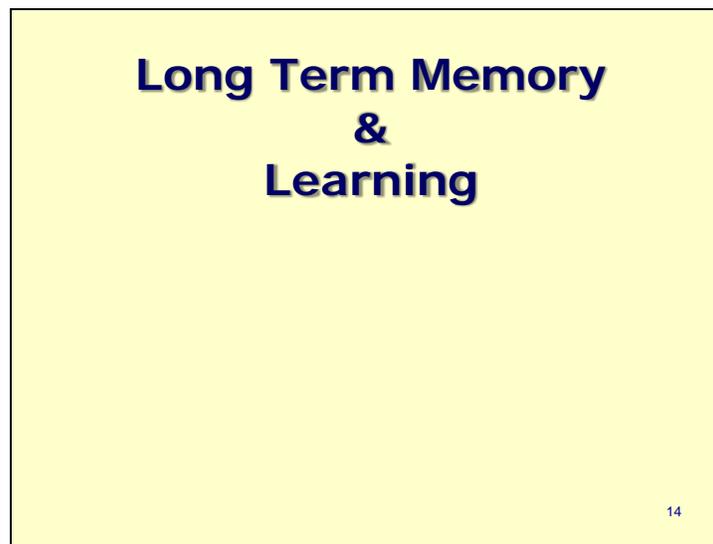
Concrete words that can be encoded in two ways have greater probability of being stored in memory.

These three features **ACTIVE PROCESSING, LIMITED CAPACITY, AND DUAL CHANNELS** are the *prime determinates for what does or does not work in training.*

We need working capacity to process new information for learning to occur

- When we load our memory capacity with content (too much) or irrelevant work, the processing is corrupted
- This is called **COGNITIVE OVERLOAD**

Slide 14



Long-Term Memory and Learning

Working memory is the star of the learning show, but it gets support from long-term memory.

An example is:

- For 5 seconds you look at a chessboard with pieces set out on it during real play
- You are asked to reconstruct it. It takes non-chess players 7 to 9 or more times to recheck the board, in order to duplicate it. It takes a chess master 4 tries.

What do you think the results would be when a chessboard is set up with the pieces on the board set in an absolute *random* order? How would novice or non-chess players fare against a chess master?

- Chess masters needed more opportunities than the novices.

Why do you think this is so?

- On a chessboard there are about 24 chunks of info – one corresponding to each piece
- For an expert, however, there are fewer chunks of info because the chess expert has a repository of play patterns set in their long term memory
 - Psychologists have estimated that chess experts store about 50,000 chess patterns in long-term memory

- Instead of recalling each piece, they recall whole clusters of pieces corresponding to various play patterns.
- When pieces are randomized, those patterns don't match up and hinder recall performance-it conflicts with their stored mental models making their recall worse than novices as they may attempt to put them in an order that makes sense...
- Unlike working memory, long-term memory has a HUGE capacity for storing information. During learning, the processing in working memory results in new or expanded patterns stored in long-term memory.
 - These patterns can be brought back into working memory when needed and endow working memory with a much larger virtual capacity.
- **There is a direct link from long term memory back to “experience” in the Adult Learning Principles.** If the learner has experience that ties to the current training concept, the mental models they have used for this are important to know. If the model you are training is not easily integrated with what is already known, the learner will take more time to learn the new method.

Brain Rules One-on-One Approach Activity (7)

In your group, with your assigned feature, take **7 minutes**:

- Define your feature
- Identify ways to address your assigned feature in the one-on-one training you provide your trainee.

Slide 15

Automaticity

- Focus Attention
- Engage Learners to Promote Processing
- Manage Mental Load
- Ensure Learning Transfer via Retrieval

Expertise and the Brain

Expertise in all domains relies on extensive patterns stored in long-term memory patterns that enable experts to make better use of the limited working memory capacity.

Sometimes those patterns get in the way.

Subject Matter Experts can overload a learner's working memory with too much content, unfamiliar terms, and lengthy lectures. The SMEs memories hold and process information much more efficiently than novices. That is why an instructional specialist, who understands that less is a good partner for an SME, helps the SME break down their content into smaller pieces and add regular practice opportunities to allow learners a chance to process new content into long-term memory.

Automaticity- A Working Memory Bypass

A second reason experts have greater proficient is because any task, physical or mental, that is repeated hundreds of times becomes hardwired into long-term memory. These automated tasks can be performed with little or not working memory capacity. Think about the way in which Calltakers tab or key through a CAD screen, use CAD shortcuts, macros, or commands. Then consider a trainee. There is little working memory being used by the veteran Calltaker, moving through a CAD interface. A new trainee may be very different as they learn the fields, commands, etc.

Automaticity is the other secret of expert performance in any complex domain. Over years of practice, many layers of skills have automated allow the expert to devote working memory to the coordination and problem solving needed to perform complex tasks.

When we go back to our driving while on the cell phone, hands free or not – what conclusions would you draw about why hands free or hand held cell phone use is equally dangerous?

Grounded Brain-Based Teaching

Instructional environments must support four key processes that transform information from instructors, workbooks, computer screens, etc., into new knowledge and skills in long-term memory.

- ◇ **Attention**
- ◇ **Processing in working memory**
- ◇ **Management of mental load**
- ◇ **Retrieval from long-term memory**

#1 - Focus Attention

We all have attention lapses. Some of what we're talking about here – you may not have processed. Attention is the first critical step of the learning episode. ***It means the learner has directed their limited amount of working memory capacity to a few elements in the environment.*** In the case of learning, you are directing your attention to the words, visuals, and what you hear or physically take part in during practice.

As CTOs, we use techniques to gain and focus attention. We use laser pointers, discuss learning objectives, etc. By understanding the intended outcome goals, learners can direct attention to the more relevant portions of the lesson. WE HELP LEARNERS FOCUS ATTENTION AND WE MINIMIZE DISTRACTIONS THAT LEAD TO SPLIT ATTENTION.

Think about times when you are reading a book with the explanatory information on one page, but to view the visual, you have to turn over a page. This creates split attention.

#2 - Engage Learners to Promote Processing

Learning is an active process that takes place in working memory. By deeply processing the attended words and visuals, the learner abstracts meaning from them and integrates them with existing knowledge in long-term memory. There are 2 main roads to help learners actively engage with content.

- **Frequent relevant activities** that stimulate the active processing needed for learning. Practice exercises are one of the most common techniques
- The second road is the use of what the author calls ***IMPLICIT INSTRUCTIONAL METHODS*** – methods that encourage deep processing in the absence of physical activity on the part of the learner.
 - An example is the use of relevant graphics. You send a coordinated message with words and visuals, so therefore you are leveraging WHAT? (Dual Channels – feature of working memory)
 -

#3 - Manage Mental Load

Learning requires that the limited capacity of working memory be allocated to active processing.

- **Effective learning environments minimize unproductive sources of mental load that bog down working memory**
- An example: a simple line drawing (GEORGE) will often lead to a better learning than a realistic three-dimensional drawing, photo or animation. The working memory can abstract meaning from the simpler drawing without being overloaded by extraneous info from complex visuals.

Management of mental load is a fundamental pre-requisite of all effective learning environments- especially when content is complex and the learner is a novice.

#4 - Ensure Learning Transfer via Retrieval

Transfer is when new learning, knowledge, skills are stored in long term memory and brought out as needed. The access of knowledge and skills from long-term memory back into working memory is called **RETRIEVAL**.

Retrieval is the psychological basis for transfer of learning.

As you plan your work with your trainee – it is important to imbed the right retrieval cues **AT THE TIME OF LEARNING**.

Grounded Brain Wrap-up Activity

Take **10 minutes** in your group and come up with a list of ways that you will try to improve the following:

- ◇ **Attention**
- ◇ **Processing in working memory**
- ◇ **Management of mental load**
- ◇ **Retrieval from long-term memory**

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Feedback Characteristics

- Objective
- Specific
- Honest
- Respectful

Our Feedback Model

Feedback is what allows the trainee to know what behaviors to continue and what behaviors to change in order to comply with performance standards. It allows the trainer to identify what needs to be presented, presented again, or emphasized. It helps the trainer plan the training process and to evaluate the effectiveness of the current training.

It is not, by definition, either negative or positive. It is a tool for learning. Feedback is collaborative. Often, however, we use the term positive feedback to refer to praise, and negative feedback to refer to 'bad things'. Due to this terminology, many feel that critique is often seen in a negative light, since it is not 'positive'. For this reason, you may want to use the word corrective feedback or feedback for improvement rather than negative when referring to this type of feedback.

Feedback can be both formal and informal.

Informal feedback can be defined as the continual positive (praise) or corrective feedback you give after any action the trainee takes. For example, the trainee answers a call and processes it. After the call, you discuss what went well and what needed improvement. You may take many calls during an hour or work shift – all calls are subject to this type of feedback.

You give informal feedback every day, to many people in different situations. Consider comments you might make such as “nice handling of that call”, “good job with that”, “I like your phrasing of call information”, to “Thanks for the nice dinner”.

Formal feedback is documented. It becomes part of the training record for the individual trainee. It is used to assess progress and make decisions about the status of the trainee.

Some agencies use incident or daily forms, while others use weekly reports. The type of system used is less important than the type of process used to gather the information and how it is presented, both in writing and verbally.

All feedback is either positive in nature (praise for what is done right), or corrective (identifying what was done wrong and how to do it right the next time).

Characteristics of Feedback and Evaluation

By providing feedback, you allow the trainee to make the corrections necessary to move forward in the training or continue doing what has been identified as correct performance. Feedback provides the trainee with growth and learning.

Corrective feedback should not be viewed as ‘negative’. Trainers who believe corrective feedback is negative often avoid what they perceive will be a ‘confrontation’. Feedback that contains the elements of objectivity, specificity, honesty, and respect is not confronting in nature. Instead, it becomes you and trainee working together to solve problems and move forward.

The same characteristics of feedback apply to corrective behavior as well.

Objective: Evaluation guidelines without defined expectations may become subjective. The trainer may evaluate the trainee more harshly or lightly depending on factors other than the performance of the trainee. ONLY the performance of the trainee (as evaluated against standards and/or objectives – not time in training) is relevant. Feedback should give facts, not feelings, or guesses about what was contributory but not observed.

Specific: Feedback should be specific – giving examples of actions the trainee performed or behaviors the trainee exhibited. However, don’t overwhelm the trainee with a long list of everything that went wrong. Concentrate on one or two points at a time.

Honest: Trainees will know if you are not being straight with them. They are often aware of their own performance. When told everything is ‘fine’, they know it is not. Trainees appreciate direct, honest feedback over vague, indirect feedback. This is part of being treated as an adult and having ownership in your own training.

Respectful: Feedback should be delivered in a tactful, respectful manner. Feedback about performance the trainee cannot change is not tactful. For example, telling the dispatch trainee her voice pitch is too low, or too high. You may provide feedback on modulation, speed of delivery, or clarity, but the physical characteristics of his or her voice may not be something he or she is able to change. Consider the location feedback is given in. Avoid giving feedback when others can overhear the delivery. Whenever possible, give feedback privately.

Give corrective feedback matter-of-factly. Do not use a tone of voice that could be interpreted as berating or condescending.

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Feedback Model

- Get
 - Ask, Reflect, Probe
- Give
 - When, What, Results
- Discuss
 - Wants, Whys, Ways

GET, GIVE, DISCUSS

There are three phases to giving feedback: Get, Give, and Discuss

Get

First, find as private a place as you can to give feedback. If one is not available, lower your voice and volume. If possible, assure there is time for complete feedback without disruptions.

Asking the trainee what they think of their performance before giving your feedback allows them to take ownership for the mistakes they knew they made, and allows the trainer to recognize where the trainee may not understand the performance standards. You may be surprised how aware your trainee is of where they could do better.

Suggested sequence of questioning:

- | | |
|----------|--|
| Ask: | “First, how did you think that call went?” |
| Reflect: | “So, you thought it could be better?” |
| Probe: | “What would you do differently if you received this type of call?” |

When probing on a specific incident, remember to ask what went well along with what could have been done better. Don't let the trainee constantly berate his/her own performance and neglect to find the positive. This is an example of where Socratic questioning techniques may be useful. Ask why the trainee did something the way they did – that is how you find out at what point the error was in their critical thinking. Or, you may find they had a good reason to do it the way they did.

Give

Follow self-assessment by the trainee with your assessment. Start with a positive to build confidence and open the dialogue.

Suggested sequence (after positives):

- | | |
|----------|--|
| When: | “When Unit 456 called out on traffic...” |
| What: | “You asked the officer to standby so you could answer the phone...” |
| Results: | “This is against policy #123 and could jeopardize the officer's safety...” |

Discuss

Adding one more steps to the previous feedback model may benefit your trainee, depending on the situation.

First, let the trainee know what you want to occur in the future:

Wants:

Whenever possible, take the traffic information prior to performing any other tasks.”
Add the whys (remember the adult learner needs to know the whys and the relevancy to their job duties):

Whys:

“Here are the safety concerns you may consider...”
And follow with procedures or training that may help the trainee in carrying out the task. Both ask them for and give them ideas on how to fix any problems – what ways or alternative methods might assist them.

Ways:

“Let’s practice the way the traffic stop should have gone and then I will let you handle all the traffic stops tomorrow. If the phone rings and I see you reach for it, I will lay my hand on the receiver to remind you where the priority is. Do you think that will help or do you have another idea that will work better for you?”

At the end of debriefing an incident, make a positive comment: “Okay, tomorrow we will practice, and in no time, this will be second nature for you”. Don’t dwell on what isn’t working, instead look forward to what will be accomplished.

Remember also that feedback goes two ways. You must be willing to hear your trainee critique your methods of training as well. Is there something you can do as a trainer to make it easier for your trainee to learn? Make sure you listen actively to their feedback to you.

Body language - Be aware that your feedback can have unintended results if your verbal and non-verbal messages are inconsistent. Look at the person and make eye-contact (honesty). Don’t laugh if you are uncomfortable. Don’t look or sound apologetic (insincerity). Don’t have a judgmental tone of voice (critical). Watch your gestures and posture. Make sure they match the message or the message will be lost.

Feedback Activity (9)

Take **10 minute**. There are 5 scenarios. Each scenario has separate handouts for the CTO and trainee. Have each group determine who will be the CTO, Trainee, and Observers. Each group will conduct the feedback scenario at their table. Observers will be responsible for watching the interaction and providing feedback to the CTO at the end on how they did at following the feedback model.

If time, have groups follow up by doing them in front of the whole group. This will allow them to make corrections based on feedback they received.

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**Bloom's Taxonomy
of
Learning Domains:**

**Psychomotor
Affective
Cognitive**

Introduction to Bloom's Taxonomy

Benjamin Bloom (1913-1999) was an American educational psychologist who created a classification of educational objectives that is still used today.

His contribution includes his identification and classification of the 3 Learning Domains. These are categories of learning.

- **PSYCHOMOTOR** – the physical realm of “hands-on” learning. Examples would be skills learned in things like carpentry or plumbing. For law enforcement, the psychomotor areas include defensive tactics, firearms training, and driving.
- **AFFECTIVE** – the realm of emotions, feelings, attitudes, and values
- **COGNITIVE** – the intellectual, mental realm dealing with information, memorizing facts, figures or information

Bloom and his associates researched learning domains in the 1950's. While it appears this taxonomy is his alone, it was actually a group effort. Categorizing learning into Bloom's domains is only one accepted model. It is, however, one of the most widely recognized and most easily understood.

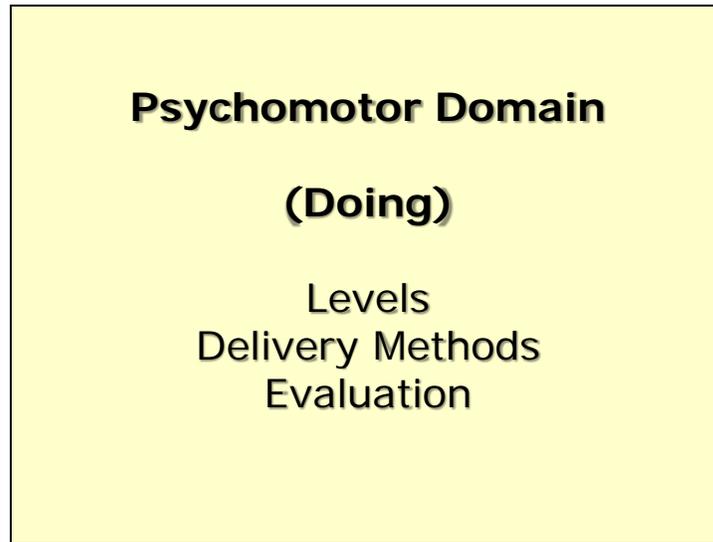
The objectives, instructional methods, and evaluation tools used to train someone are dependent upon the learning domain and the level (or complexity) of the learning that is involved.

Knowing which domain you are addressing helps the CTO to train using appropriate methods to deliver the material and evaluation techniques to determine that the appropriate learning level was achieved.

This is a *critical* point. How we approach training is dependent on within which of the 3 domains we are training and at which level within that domain we want the performance to reach.

DOMAIN + LEVEL WITHIN THE DOMAIN = PERFORMANCE TO WHICH WE TRAIN

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THE PSYCHOMOTOR DOMAIN

The Psychomotor domain deals with *physically* “*doing*” job tasks

- Use of physical abilities
- Skilled movement – speed/strength
- Aim/adjustment
- Balance/coordination
- Flexibility

The learning of physical skills involves working with the phone system, the radio console or PC, our CAD systems, and other equipment. It is the actual ‘doing’. A trainee must have the cognitive skills to know how and when to use the equipment, but that is not enough. They also must be able to physically do all the steps necessary to complete the task.

Often, we don’t see the complexity some of our physical skills present to the learner. But remember that some skill must be done in a proper order and completely – without leaving any steps out, and in a timely, precise manner.

Keying the mic to properly complete a radio transmission without cutting oneself off is a psychomotor skill. So is properly timing the radio transmission with tones or other activity. Entering information into a CAD system includes moving between screens and fields quickly, and then typing correctly. Setting up a radio console to work a certain frequency or for a particular event involves many physical steps.

Levels within the Psychomotor Domain

- **Imitation (lowest)**
- **Manipulation**
- **Precision**
- **Adaptation**
- **Naturalization (highest)**

For our trainees, the lowest level of psychomotor skill is only a beginning point. **Imitation** has severe limitations. And, while **manipulation** (practice so somewhat proficient) is good, it is not performing at a level comparable to what most of our agency' workload requires. **Precision** implies that the skill has been attained, with quick and consistently accurate performance. We want our trainees to reach the level of precision in their motor skills, leaving little room for error.

Adaptation involves being able to quickly modify the skill when required to meet specific demands. **Naturalization** is automatic, without thinking. The skill is so well understood that the trainee can perform and make changes to performance as needed, without thinking – can create new patterns of actions because interrelations are so well understood. Adaptation and naturalization come with experience, usually after the trainee has been released to work alone.

DELIVERY METHODS for the Psychomotor Domain

Your trainee must consistently perform all the physical skills necessary to complete the responsibilities of the job.

Often, hands-on skills must have cognitive knowledge as a background. It is the application of the cognitive learning that includes use of equipment and physical skills. Application can take several forms, such as role-playing the task being done in different scenarios or simulations.

Some agencies have simulation equipment that allows the trainee to practice the task on equipment similar to what they will be using on the floor, pushing buttons, keying mics, but without interfering or interacting with on-duty units (for example, a training frequency that allows the trainee to use an actual radio in practice). Others must rely on 'pretending' the actions using the actual floor equipment but not following through with the actions (not keying the mic but touching the mouse to indicate they are).

Psychomotor skills can be addressed through demonstrations (watching someone do something) and observation of the trainee imitating the task. Demonstration/Observation works even better when incorporated into a **Tell-Show-Do method**. In Tell-Show-Do, the trainer first tells the trainee how to do something, then shows them, and then has the trainee imitate the actions. Repetition (practice) follows as the trainer makes corrections as necessary, until the trainee can perform the skills without assistance or the need for corrective feedback. At that point, the actions may be precision – the performance level we are working toward.

Practice is the path to meeting the desired levels of the psychomotor domain.

EVALUATION METHODS for the Psychomotor Domain

For the Psychomotor Domain, we primarily use these methods to evaluate (San Jose) or note and document trainee performance (Reno) in this domain:

- Observation (CTO) & Demonstration (Trainee)-in the ATM the CTO journals daily about performance observations and comments on the Weekly Coaching Report self-assessment of the trainee
- Physical performance or skill test
- In the ATM there are 2 evaluation periods built into the program. The first, mid-way through the program. The second, at the end of training. A separate CTO is brought in for a minimum of 3 days up to a full week. This CTO has evaluation criteria and is there strictly to evaluate the trainee's performance. This person is called the CTE-Communications Training Evaluator.

This is an opposite of the Tell-Show-Do method that has the trainer demonstrating the task while the trainee observes. In this case, the opposite is done, the trainer observing while the trainee demonstrates proficiency.

It is necessary to repeatedly watch and note performance. New skill levels can slip when the trainee is fatigued, unfocused, or is learning new material. Precision requires consistency.

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THE AFFECTIVE DOMAIN

The Affective Domain deals with *feelings, emotions, attitudes, beliefs, and values*.

Different cultures have different affective base lines. And, people can change their beliefs and values. Don't assume your trainee comes to the job with the same feelings you have. Their truths may become evident through their verbal or physical interactions. Watch for responses and behaviors that indicate how the trainee **feels** about the incidents, callers, and tasks.

When thinking of the affective domain, think of such attributes as good sportsmanship, cooperation, empathy, respect. Also think about positive outlook and attitude, open-mindedness, consideration of others and the big one: Emotional Intelligence.

Emotional Intelligence is built upon four foundational principles:

- Emotional self-awareness (identifies emotions in self)
- Emotional self-management (manages own emotions appropriately)
- Social awareness (detects/is aware of emotions in others)
- Relationship management (appropriately deals with the emotions of others to improve relationships)

In the ATM/Reno model, EI is a fully recognized competency. For every phase of training, there are 3 statements created, which describe the desired performance. The ATM uses Bloom's taxonomy (specifically, the Cognitive Domain) to create these performance statements. We'll discuss them more later.

A good example of the separation of affective versus cognitive domains is that of organ donation. I can tell you why organ donation is important, how many people are waiting for a particular organ, how many will die before they get a donation. I can tell you how to indicate you want to be an organ donor, and what you would need to tell your family. All of the previous are facts, figures, things you would know. All are cognitive.

But, you still may not **believe** that you personally want to be an organ donor. You may feel only alcoholics would really need a liver (your **truth**). You may have **feelings** about being buried as a whole body. Your religious **values** may demand that type of burial. No one else in your family would consider organ donation (your **norm**), etc.

Do your trainees believe that DV victims should “just leave”? Is the customer always right? Is speed of entry more important than customer service? What is their reaction to a death of a child? When a responder is rude to them, what is the proper action?

Levels within the Affective Domain

- **Receiving (awareness)**- is willing to see a particular issues (**lowest level**)
- **Responding** – reacts or responds (**complies**, at first, and hopefully later with willingness & satisfaction)
- **Valuing** – Decides or accepts the worth of the idea or issue
- **Organizing** – organizes the importance of values, looks for interrelationships, embraces the concept or issue as part of ones’ own value system
- **Characterizing (highest level)** – integrates the value, opinion, or belief into one’s own philosophy and behaviors

One of the ways the Adult Training Model deals with affective issues is through the use of a reflective (learning) journal. It is a requirement of the job that a trainee in a program that uses this model, journal daily about their experiences. Journals may have required formats or may be free form. The purpose, however, always is for the journal to allow the trainee to reflect upon the day’s events and learning and to write about them.

Some formats for the trainee journal include the: What (happened?), So What (does it mean, do I need to know, should I do?) and Now What (what does the trainee need to do to improve in this area, learn more, investigate further, etc.?). This journal is particularly useful to assist the CTO in understanding things that may be emotional or value issues for a trainee.

DELIVERY METHODS FOR THE AFFECTIVE DOMAIN

There are several methods for delivering affective materials:

- Tie all training back to your (meaningful) agency vision, values, goals, and mission statements
 - These should be living, breathing, achievable statements about how your agency does business. They need to be internalized.
- Role-modeling positive behaviors – this is extremely important for a new person. Telling them what acceptable behaviors are in the workplace is less effective than showing them what those behaviors look like.
- Role-play and reverse-role play – particularly when dealing with emotional hot-topics or areas where you want to encourage more affectively-appropriate behaviors such as empathy, consideration, respect, etc.
- Review of videos with debrief afterward
- Discussion – open and honest about the emotional aspects of this work and dealing with persons in crisis and in the midst of sometimes tragic circumstances
- Printed materials and articles – stress management, critical incident stress information, domestic violence, and child-victim topics. This is information that can be introduced through written media, and then discussed later.

Remember the goal is to make your trainee aware of and interested in complying with the norms and values of your agency. The first method to train to the agency’s stated mission statement (and vision, values, and goals statements). The next method is by modeling the behavior you want to see in your trainee. If timeliness is important to your agency, be on time and ready to work. If customer service is the outstanding value for your agency, you must model that behavior.

Even if you disagree with the value the organization holds, you must uphold them. The future of your trainee is dependent in part on how they are able to fit into the organization. You should be cognizant that the values you portray to them may help or hinder their current and FUTURE development in your agency.

Reverse role-play is a good way to change attitudes about people or situations. Have the trainee play the part of the caller and then treat them in ways both positive and negative. While the trainee is only playing the part, they will still be able to empathize with the caller's situation.

Videotapes can create feeling with scenarios that cannot be duplicated in a classroom or while training on a console. Consider the impact of videos where DV victims talk about their situations.

Reviewing written materials that deal with affective topics with an honest discussion or debrief afterward is also a useful way to deliver information that falls into this domain. The discussion or journaling after reading the material is a way to solidify the information and to check in with the trainee on how they received the new material. For affective topics, do not underestimate the value of a thoughtful discussion.

EVALUATION METHODS FOR THE AFFECTIVE DOMAIN

For the Affective Domain, evaluation methods (San Jose) and performance documentation (ATM) are very similar. The methods include:

- Self-assessment by the trainee – In the ATM this is done weekly in what is called the Weekly Coaching (& Training) Report. The trainee picks a call that epitomizes the week and answers self-assessing questions tied to each of the competencies. Additionally, in the ATM there is a trainee journal available for the CTO and Training Coordinator to review
- Observation – the CTO observes *behaviors and performance* of the trainee, documenting them. This is already built into the ATM with the daily CTO journal, noting observable behavior and documenting the methods used to impart information. It is also the job of the ATM CTO to comment on the self-assessment (Weekly Coaching Report) of the trainee each week.
- The Communications Training Evaluator (CTE) evaluates performance, including the Emotional Intelligence competency. This competency includes: Customer Service, Stress Management, (and CISM), Interpersonal Communications, and Emotional Intelligence in the workplace. The evaluations are done mid-phase (half way through training) and post phase (at the end of training).

If you want to know if your trainee is aware of the organizational values, you can ask them. Allow them to outline for you what they think the preferred values, beliefs, and attitudes of your organization are. What attitude should be presented to a DV victim? Is the customer always right? Is speed of entry more important than customer service? What attitude is okay when handling the death of a child? When a responder is rude to them, what is the proper action? Ask them.

If you want to know if the trainee is complying with (accepting while at work) the organization's values, observe the outward signs (behaviors) of those attitudes and beliefs. Attitudes can be inferred from observable behaviors. A trainee who takes a call from a victim of domestic violence, is curt or rude, hangs up on the phone and rolls his/her eyes, has observable behaviors that may be attributed to 'attitude'.

Are they treating DV victims with the same concern as other victims? Are they helpful even with difficult callers? Are they able to remain professional while handling a child's death? Do they use respect with responders who are not respectful. Do they become sarcastic? Observable behavior often answers these questions.

Support for organizational values can be observed in what the trainee says or does when not engaged in the performance of the task. Does the trainee handle the DV well, but make comments in conversation with you that show they really don't feel the way they acted out of compliance. If the trainee is not supportive they should be made aware that sharing those views with others is not advisable. However, as a CTO, there is little you can do to force support of your agencies values.

Documenting Behavior

Documenting Behavior ACTIVITY (10 – 2 parts)

Take **15 minutes** in your groups. Using your tablets, research ways in which behavior can be articulated and documented. Consider looking at multiple websites or places to find the information. Take about **5-8 minutes** to locate the information and then use the remainder of the time to create a list with what you've learned.

Notes:

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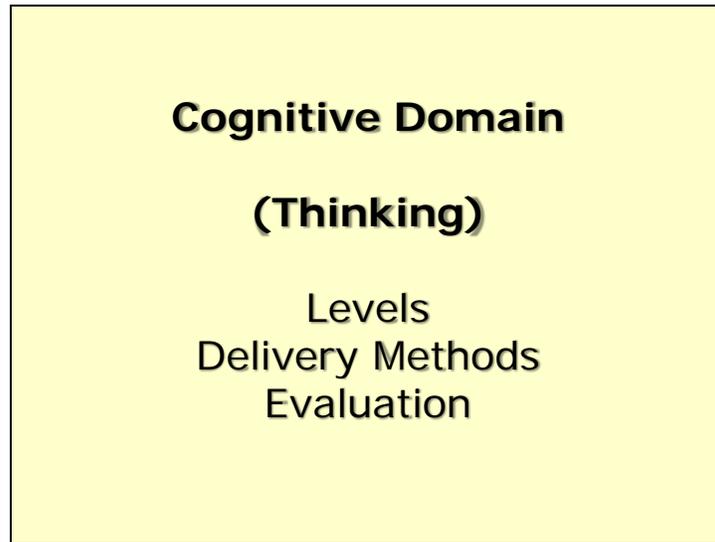
Documenting Behaviors

Ways in which you document behaviors:

- Deal in facts - when where what who how
- Include positive and negative behaviors
- Avoid adjectives, emotional content, personal impressions, biases, document observations, not assumptions
- Be specific, brief but complete, consistent
- Track trends
- Utilize objective terms
- Avoid labeling or attaching intent
- "I saw", "I observed," "I heard,"

It is important to remember when you are documenting behaviors that fall into the Affective Domain, to keep your own emotions out of the documentation. Using factual, objective language ensures that your own emotion around a behavior does not taint the documentation.

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THE COGNITIVE DOMAIN

The Cognitive Domain is the realm of *thinking*. The Cognitive Domain includes:

- Concepts
- Ideas
- Processes
- Formulas
- Mental information
 - Lists
 - Memorizations

Brainstorm Cognitive Topics Activity (11)

Take **5 minutes** in your groups and come up with a list of training topics that you train on which are:

- ✓ Ideas
- ✓ Processes
- ✓ Formulas
- ✓ Mental information
- ✓ Lists
- ✓ Memorizations

Levels in the Cognitive Domain

- **Remembering (lowest)** – memorizing information; recalling; identify
- **Understanding** – to comprehend a topic
- **Applying** – to be able to apply remembered and understood concepts and information
- **Analyzing** – to be able to distinguish differences
- **Evaluating** – to assess, justify, defend, contrast
- **Creating (highest-most complex)** - to adapt, anticipate, predict, modify, “think outside the box”

Remembering is being able to recall or remember facts, lists, and formulas; for example, knowing the phonetic alphabet or military time. This is the level of recall or memorization.

Understanding is the comprehension of that knowledge. For example, being able to translate from 12-hour to 24-hour time, or to be able to translate call-type codes to their descriptions. Comprehensive involves some sort of interpretation of learned material.

Applying indicates being able to take the above information and use it in situations. This would be using CYMBALS to describe a vehicle or apply the correct call-type code to a set of information. This is the simple application of basic knowledge.

Analyzing implies reasoning and problem solving. This includes understanding of relationships between parts. Analysis would include reading several holding calls and determining their relative priority based on a number of criteria. This is the application of a more complex operation.

Evaluating often applies to the ability to look at parts and make a valid judgment with reason, based on criteria. The highest level of thinking, this level may be very complex. An example of evaluation would be a doctor making a diagnosis from signs and symptoms, and then choosing and monitoring a combination of medications used to treat the suspected disease in a specific patient, evaluating the possible interactions. In communications centers, evaluation might be the supervisor's use of ICS during a large, prolonged event – requiring changes in scheduling and tracking of many employees' work at the same time – then making changes in tasks as elements change to accomplish a larger goal.

Creating includes combining elements to create new ways or methods. Creating may include solving a problem when no policy or procedure comes close to addressing the issue, where decisions must be made using several criteria of equal importance. Think of a major event within the community (plane crash, high school shooting with MCI) where thinking outside the box may be a prerequisite to getting the job done. At this point, the telecommunicator may have to outline a plan of operation to fit the incident on-the-fly. Experience on the job leads to the ability to create new ways of reaching objectives.

When you hear about KSA's, Knowledge, Skills, & Abilities, think about them in terms of Bloom's.

Knowing & Remembering = Knowledge – what we know or need to know

Applying = Skill – the ability to apply knowledge & comprehension

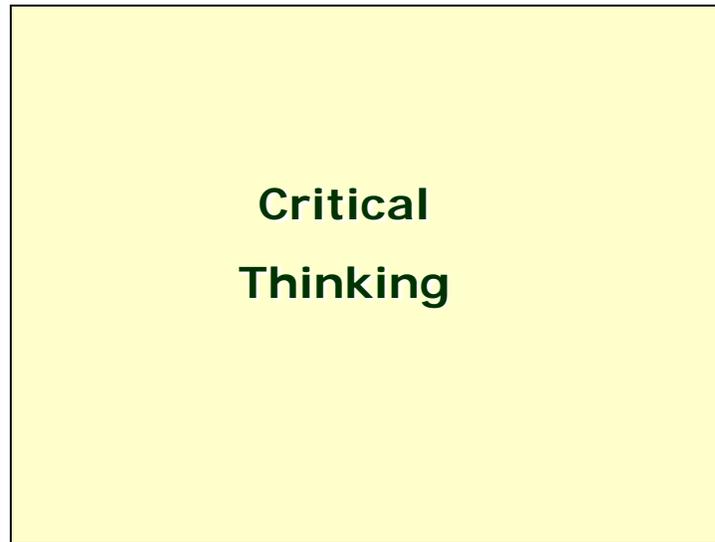
Analyzing, Evaluating, Creating = Ability - this is the area where complex problem-solving comes into play

So often you hear people talk about knowledge, skills, and abilities. *In the context of Bloom*, Knowledge (Remembering) usually means learning at the lowest two cognitive levels. Applying indicates a skill using the knowledge in a situation. The top three (more complex) levels usually indicate an ability to integrate much information within differing situations. This may also be considered the ability to problem solve or to think critically.

While there is much base-line knowledge involved in instructing telecommunicators, and certainly we expect them to be able to apply that knowledge, we strive to reach the higher levels of ability before releasing a person from training. It is not enough to fill a trainee with facts and the skill to apply them in a given instance. We must also prepare them to problem solve, using the facts and critical thinking skills they have in a variety of combinations to best serve the situation.

These examples we are using here are ONLY in the context of Bloom. These words (KSA) mean different things in different contexts.

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Critical Thinking

It may help to ask the students to define *critical thinking*. Ask for examples. Here are some expert opinions from leading researchers:

Robert Ennis: Critical Thinking is reasonable, reflective thinking that is focused on deciding what to believe or do.

Matthew Lipman: Critical thinking is skillful, responsible thinking that is conducive to good judgment because it is sensitive to context, relies on criteria, and is self-correcting.

Richard Paul: Critical thinking is thinking about your thinking, while you're thinking in order to make your thinking better.

While Evaluating and Creating are important levels of cognitive learning, analysis is the “meets standard” level for new trainees. Evaluating and Creating come with time and experience – levels a new trainee will likely get to later in their careers.

The goal of this class is that you reach the analysis level for this information. We want you to be able to apply the principles with practice when you return to your agency. In time, you will be able to evaluate your own knowledge and performance (evaluating) and find better ways to train your trainees (creating)!

In the ATM, each of the 7 identified training competencies has 3 performance statements provided for each phase of training. The three performance statements directly relate to Bloom's. The first statement is a Remembering or Understanding statement about the competency, i.e., the student will be able to identify the purpose of all CAD fields on the Calltaker screen. The next statement is an Applying statement, i.e., the student will be able to populate the applicable CAD fields on a non-emergency call (Phase 1). The third statement is an Analyzing, Evaluating, or Creating statement, i.e., when faced with an address that will not geo-confirm, the student will find a way to insert the address so that it will confirm. This is an important distinction to remember between the San Jose and Adult Training/Reno Model

Correct Cognitive Level Activity (12)

Take **15 minutes** in your groups

- * Each group will be given a page of tasks done by telecommunicators.
- * As a group, decide which of Bloom's cognitive levels best describes the task
- * At the end of the time period, we will come together as a class and review the results.

Cognitive Learning – a Function of the Level

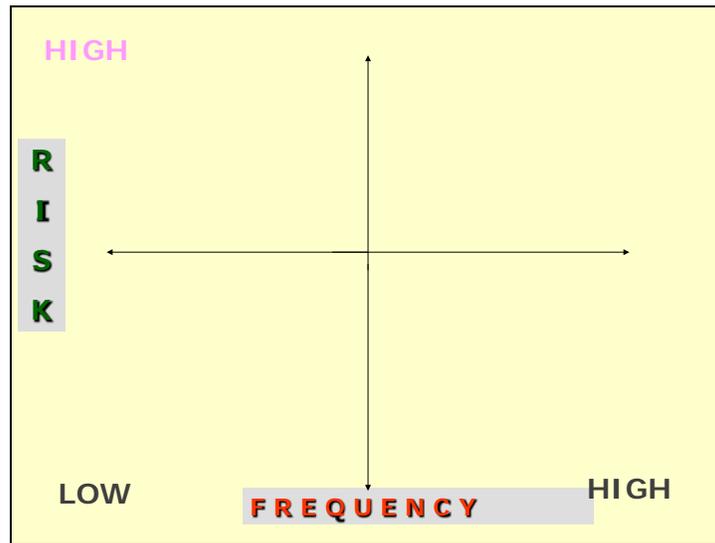
| Cognitive Level | Examples | Objective Verbs | Methodologies |
|-----------------|--|---|--|
| Remembering | Facts, terminology, codes, definitions, priorities | Arrange, define, list, memorize, name, organize | Policy and procedure review, games (crosswords, maps), verbal drills, manuals, ISM workbooks, videos |
| Understanding | Describing criteria for codes, describing when to use terms, priorities | Classify, describe, explain, identify, locate, select, sort | Matching, demonstration, discussion, games (jeopardy, maps), Q & A |
| Applying | Picking the correct codes, priorities for a specific set of information, asking the questions in the correct order for the call type, applying policy to procedure | Apply, choose, demonstrate, illustrate, operate, enter call, format or reformat call data | Practical exercises, role playing, trainee demonstrations, work samples, discussions |
| Analyzing | Using EMD cards to give pre-arrival instructions and post-dispatch updates (CBD) | Analyze, categorize, compare and contrast choices, differentiate | Case studies or review of calls, articles and discussions, mental imagery |
| Evaluating | Arriving at judgments based on all available resources, practical considerations and available resources | Assess, defend, evaluate | Post/critical incident reviews, problem based scenarios, guided discussion, guided imagery |
| Creating | Using databases to gain additional information, evaluating that information and changing the call type, priority, or entry based on the outcome of the analysis | Arrange, create, organize | Problem based scenarios, guided discussion |

Law of Response Level: *Learners master skills and knowledge at the level at which they are required to respond during the learning process.*

If your training activity requires participants to merely talk about a procedure, don't assume that they will be able to apply it in their workplace. If you want participants to solve workplace problems, the learning activity should require them to solve problems. Challenge participants with complex, open questions that require innovative solutions. Even if you begin with simple tasks in your training activities, gradually progress to complex challenges. By the creation of more complex practice activities, the trainee learns to expand his or her thinking to rise to the occasion-which is the "response" to more complicated tasks.

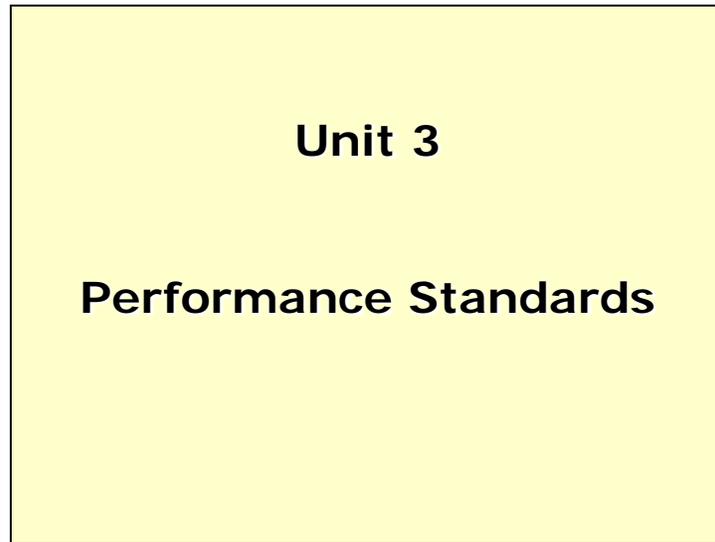
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Review the concept of Gordon Graham's High Risk/Low Frequency preparation.

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Unit 3

Performance Standards

Unit 3 – Performance Statements

Learning Expectations for Unit 3:

At the end of the course the student will be able to:

- **Describe the differences in performance statements between the San Jose and Adult Training models**
- **Describe how these statements are used in both models**
- **List the components of a learning objective**

“The **performance statement** is a statement focused on the control points for successful performance. The whole idea behind the performance statement is to identify the most important things you need to do that cause you to perform successfully.”⁴

We’ve identified the performance statement in the San Jose model as the SEG.

An effective performance statement or Learning Objective may include: action verb + deliverable + qualifier.

The trainee will demonstrate (verb) the ability to interview callers (deliverable) in an effective manner (qualifier).

Learning Objectives

One common type of performance statement is the Learning Objective.

Learning objectives outline the goals of the training and what is expected of a student successfully completing training. A learning objective delineates what the student will be able to do or how the trainee will be able to perform after the training is completed. As such, learning objectives give the trainee a road map for the training session and help the session stay on task.

In addition, they help the trainer to chart the progress of the trainee against the expected performance indicated. Trainers also use objectives to select teaching techniques that will maximize learning.

⁴ Dr. Jason Selk Enhanced Performance, Inc.

Objectives help both to stay on focus and be results oriented.

Learning objectives are sometimes called performance objectives, educational objectives, behavioral objectives, aims and outcomes or competencies.

In order to ensure that the trainee is successfully completing training on a task, we need to know Performance, Condition, and Standard:

- What they need to do (Performance)
- Under what circumstances they need to do it (Condition)
- How well they need to do it (Standard)

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Learning Objectives

- Performance

- Condition

- Standard

Performance is the word we will use for what the trainee needs to do. The performance part of an objective usually starts with a verb:

Recite the phonetic alphabet
Tone out the appropriate apparatus
Set-up a simulcast
Treat the customer with respect
Prioritize the calls
Draw a map
Discuss prioritization decisions

We train on these ‘tasks’ and expect the trainee to be able to *perform* the task at the end of the training. The verb used points toward the domain and level the task will be learned in. For example, the following verbs would suggest the task is performed in the cognitive thinking domain: recite, translate, define, and list, articulate, explain, define, etc.

Condition is the word we use for the circumstances under which the trainee must perform.

From memory
Using the simulator
Using the form provided
In the classroom
On the floor
Using CYMBALS

If a condition is implied (all training is taking place on the floor, at the console), it is often left out of a formal objective.

Standard is the term we use for how well the trainee needs to perform.

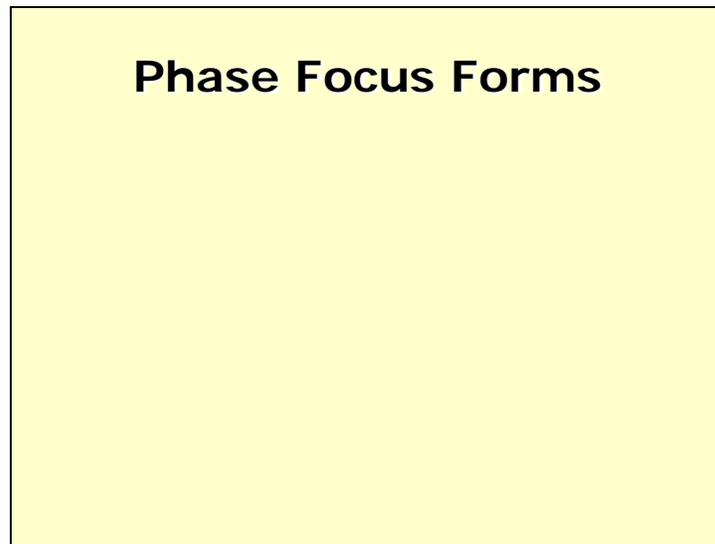
As demonstrated or modeled by the trainer
With 100% accuracy
Within 5 minutes
Within 30 seconds
According to policy
9 out of 10

Many tasks include sub-tasks within different domains. For example: Dispatch the following five calls, prioritizing each call by using the criteria in Policy 101, within 2 minutes. In order to perform to the standard that was set, the trainee must already have all the skills to 'dispatch' as well as comprehend the information in Policy 101.

Some trainers use the term behavior instead of performance, and degree instead of standard. Some also add a fourth component – audience: Who is doing the task, IE. The student, the trainee - but this is implied in all objectives.

Generally, objectives should be measurable. Many times affective tasks at the Valuing level are hard to measure, but compliance (Responding) can be determined by breaking down the task into observable behaviors. For instance, to measure the Responding Affective Level to treating customers with respect, we might talk about tone of voice, using proper names and lack of sarcastic remarks.

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Other Types of Performance Statements/Outcomes

The Adult Training Model based on the Reno model uses competency. The competencies are pre-determined. For this model, the statewide workgroup who worked on this model chose the following competencies for Telecommunicator Training:

- Geography
- Policy/Procedure
- Call Processing
- Equipment and Technology
- Interpersonal Skills (Emotional Intelligence, Customer Service, Stress Management, etc.)
- Communications Skills (Verbal, written)
- Use of Resources (Internal and external)

For each phase of training, there are Phase Focus forms that do a number of things. For purposes here, we are only looking at the performance statements. Here is an example of performance.

| PHASE: A | |
|---|---|
| PHASE NAME: GEOGRAPHY | |
| CORE COMPETENCY | |
| <hr style="border: 2px solid black;"/> | |
| • CELL A7 | GEOGRAPHY |
| <i>Statement : The Trainee will demonstrate the ability to read maps, demonstrate an awareness of addressing systems; boundaries and jurisdictions, freeways, and landmarks, and all mapping tools for the purpose of effectively processing calls for service.</i> | |
| PERFORMANCE OUTCOMES | |
| <hr style="border: 2px solid black;"/> | |
| Bloom's Levels | Statement |
| Remembering | The trainee will define the geographical boundaries of each jurisdiction. |
| Applying | The trainee will identify different jurisdictions based on a map. |
| Problem-Solving (Analyzing, Evaluating, or Creating) | The trainee will explain the impact of jurisdiction on call processing. |

Here are Phase C- statements for Geography (Phase C is the final phase in our ATM course):

| PHASE: C | |
|---|---|
| PHASE NAME: GEOGRAPHY | |
| CORE COMPETENCY | |
| <hr style="border: 2px solid black;"/> | |
| • CELL C7 | GEOGRAPHY |
| <i>Statement : The Trainee will demonstrate the ability to read maps, demonstrate an awareness of addressing systems; boundaries and jurisdictions, freeways, and landmarks, and all mapping tools for the purpose of effectively processing calls for service.</i> | |
| PERFORMANCE OUTCOMES | |
| <hr style="border: 2px solid black;"/> | |
| Bloom's Levels | Statement |
| Remembering | Given 5 lat./long. locations the trainee will locate them on the map |
| Applying | Given 5 addresses the trainee will describe the process of entering the location into CAD so that it is geo-verified in CAD |
| Problem-Solving (Analyzing, Evaluating, Creating) | Given an address or location where there is insufficient information to verify the location, the trainee will attempt to obtain additional clarifying information, and determine when there is enough accurate location identification to initiate a response |

You can see the progression of performance statements when you compare the trainee's first phase of training, to the trainee's last phase of training.

Think of performance statements as the archery target involved (deliverable), along with the weather conditions under which you must perform (qualifier), and the action you are taking, aiming, sighting, or shooting (action verb).

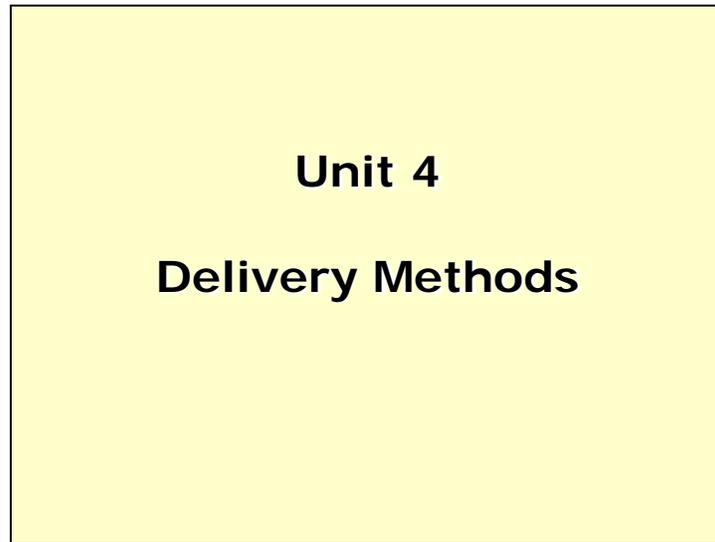
We have a handout for you. If you are interested in seeing the original that includes a section on management, training, and leadership competencies and performance statements, this document can be found on the web from the Washington State Human Resources.

You can see in this example that you can identify the competency as a group, which how we set up the competencies in the ATM model training. Interpersonal Skills is a great example of a competency group. Under the Competency Title for Interpersonal Skills, we include: Stress Management, Customer Service, Emotional Intelligence, etc. There would certainly be room for some of the examples here like Relationship Building, Valuing Diversity, and Teamwork. The examples of statements are below, but as in this document, they can be easily hyperlinked for trainers to have real examples of performance statements in each Competency Group. This is a really useful example of a way to create better performance statements.

Create Performance Levels Activity (14)

Identify a situation (or assign) and create performance description for each level. Take **10 minutes** to create all the levels within the domain.

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Unit 4
Delivery Methods

Unit 4 – Delivery Methods

Learning Expectations for Unit 4:

- **At the end of the course the student will be able to:**
- **List delivery methods used for the Affective Domain**
- **List the delivery methods used for the different levels of the Cognitive Domain**
- **Describe the requirements for Tell-Show-Do**
- **List the rules for Role-Play**
- **Describe the use of Questioning and Socratic Questioning in training**

Before we begin to look at delivery methods for one-on-one training, let's take a look at a short video on introverts. While we will be looking at means to delivery training, one consideration to make is how you can flex the approach you use depending on the preferences of your trainee. Introverts can be one of those, in a field where many are extroverts.

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Delivery Methods

- Behavior Modeling
- Tell-Show-Do
- Drills
- Mini-module
- Games
- Role-play, reverse
- Practical exercises
- Self-guided
- Ride-along
- Discussion

CTO DELIVERY METHODS

We use a variety of delivery methods to train our new hires. A delivery method is a technique used to impart learning. Examples of delivery methods include:

- Behavior Modeling
- Tell-Show-Do
- Drills
- Mini-Module Training
- Games
- Role-play, reverse role-play
- Practical exercises & activities
- Self-guided Study
 - Research
- Ride-alongs
- Discussion

Let's look at them individually.

Behavior Modeling

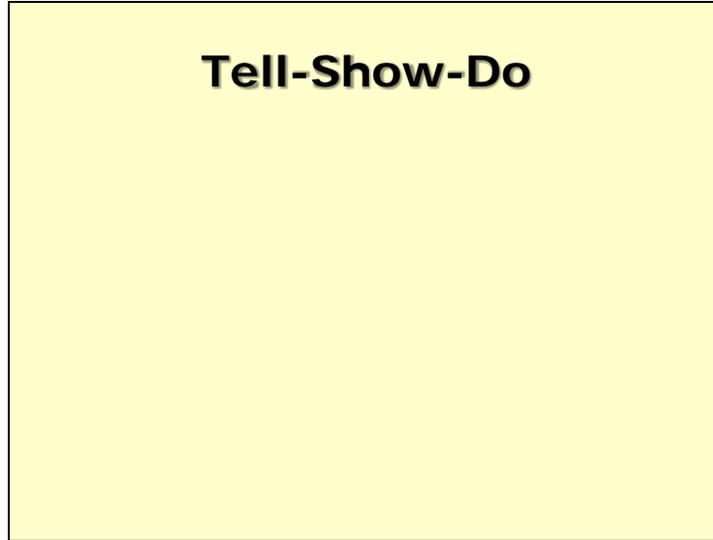
Modeling the preferred behavior is an effective way of influencing the affective domain. Trainees, however, will notice inconsistent application on the trainer's part and become confused about what behavior should be emulated. Make sure your 'walk' matches your 'talk' **all the time**. And, make sure that 'walk' matches the stated mission, goals and values of the agency. Don't expect your trainee to act any differently or better than you act in your interactions with users, peers, and citizens.

One area where it is easy to lose focus is in our own interrelationships. Set aside your opinions and dislikes about other employees and users. If you talk about other people, your trainee will come to expect that you also talk about them.

To your trainee, you hold all knowledge. They know you are evaluating them and expect you to be honest. Their progress through training is, at least in part, in your hands. They take your role seriously. You should, too.

YOU ARE NOT JUST TRAINING GOOD TELECOMMUNICATORS, YOU ARE TRAINING GOOD EMPLOYEES.

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Notes on Tell-Show-Do:

Activity – Tell-Show-Do

You will have **10 minutes** as a group to discuss the activity. Then each group will have **15-20 minutes** to present their Tell-Show-Do and debrief the class. Those groups not presenting will be expected to give honest, specific, and usable feedback to the presenting group.

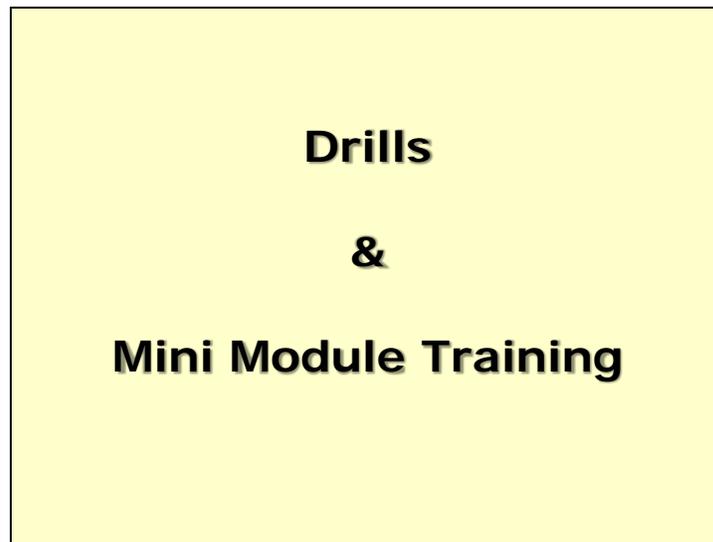
Directions:

Each group will be assigned a psychomotor (doing) skill using simple office equipment (staple 2 sheets of paper together, use a hole punch, Start, stop and clear a stop watch, load a stapler with staples, and load paper on an easel stand).

As a group, take **10 minutes** to determine the simple steps that make up the task. Write those steps down on your chart paper for later presentation to the class.

Have the group members role-play using the steps to teach the skill to the class using the class as a trainee.

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Drills

There are several types of “drills” you can use to allow your trainee to practice. They are:

- Paper drills created where the trainee must recall, translate, interpret or otherwise work through the drill
- Oral drills where the trainer verbally provides information to the trainee and the trainee responds verbally
- Practical drills are typically more “hands-on” physical drills “doing” something

Paper drills consist of asking the trainee to recall or translate information when given a visual cue. For example, the trainee is given a sheet with the possible call type CAD codes on one side. The trainee then translates the code to the description by filling a corresponding blank on the paper.

Verbal drills consist of giving the same type of drill, but without the paper. The trainer verbally gives a code and the trainee responds verbally with the description. These can be combined effectively by using verbal cues such as 3” by 5” flash cards held up by the trainer. The trainee then verbally responds with the information.

Practical drills are more often used with psychomotor (doing) skills. Drills in this sense are quick repetition of previously learned skills. The trainer provides all information or direction necessary for practicing the skill and the trainee responds with the physical motion of performing the skill. For example, the trainee might be asked to show the proper sequence for switching from an audible call to a TTY format. When the one response has ended, the trainer might ask for the same motions to be quickly repeated, or interrupt those motions with another phone skill such as transferring a call or conferencing into another call.

How can the trainer re-enforce learning even more? Involve the trainee in creating cards and tests as another way of learning for the trainee. Having them create a set of 3” by 5” cards will reinforce the learning.

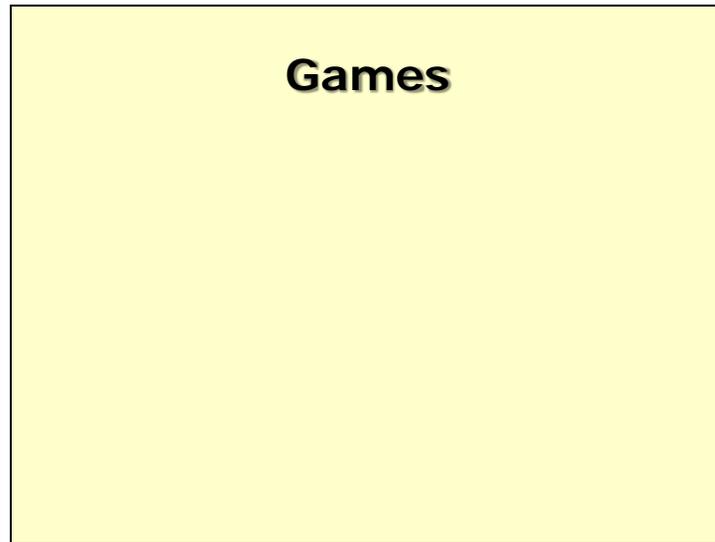
Mini Module Training

Based on the work of Gordon Graham, mini module training consists of questions or scenarios that can be researched (if needed) and answered within 5-15 minutes. These are administered daily, typically and can be used for all staff, not just trainees. Mini module training is a way to affect attitude through the use of questions that regularly show up that deal with topics such as customer service (You receive a call from a customer who....). Look for the trainee’s attempt to problem solve, go above and beyond, and apply effective customer service techniques, in this scenario. It is a good way to reiterate policy and procedure. Create a scenario and ask them to determine a response and to articulate which policies or procedures are involved.

Mini module training can be used to increase technical knowledge through the use of questions that require more advanced knowledge of CAD, phones, mapping, telematics, etc.

It is an excellent way to “drill” on high risk/low frequency (few occurrences) types of events (violent assaults, HazMat, SWAT, inclement weather, Active Shooter, etc.). Create multiple questions around these events that show up frequently during the course of training. Create a long-term memory through frequent high risk/low frequency questions so that during an event the response becomes second nature.

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Games

Examples of games:

- Jeopardy
- Concentration
- Word search
- Crosswords
- Scavenger hunts
- Geography bee

Games can be fun, but are still structured interactive approaches to learning. In order to be of value, games must be relevant to the objectives of the training program.

These activities are frequently based on common board games or television game shows. Most material that can be taught using games can also be taught using other delivery methods. But games demand participation, are usually fun, and increase motivation. Trainees often learn material while forgetting that is the objective of the activity.

Games are especially appropriate for teaching and reviewing knowledge and comprehension in the cognitive domain.

Many games work best with two or more trainees. If you and another trainer are at similar milestones in the training process, consider having one trainer coordinate the game while the other trainer takes a break from their duties.

Word searches and crossword puzzles are effective in building vocabulary, assisting with geography and other learning which involves lists of words. Word searches are very easy to create, while crossword puzzles take a bit more work.

Scavenger hunts can be very useful in learning geography. Send the trainee out (as your policy allows) with a list of information they must return with. For example, ask them to bring back a piece of paper signed by the battalion chief at a fire station they must find, or a brochure from a common landmark, or information about the police station of one of your jurisdictions. Have them measure mileage between two points you want them to visit.

Jeopardy-like activities can be set up with more complex information earning the trainee more points. For example, under 'Domestic Violence' for 100 points, the answer might reflect the code for DV in your CAD system; for 200 points, the answer might reflect fatality factors; for 400 points, the answer might reflect the definition of hearsay. Jeopardy works best with more than one player, so 'ringing' in first can be a part of the play.

Concentration can be done with a twist by matching pairs where one card is the call type description while the matching card is the CAD code for the call.

Geography bee is best done with at least two competitors. Throw each a street or place name until trainees incorrectly recite where the street or place is. Continue until only one trainee remains.

The possibilities for games are only as endless as your ideas.

Activity – Training Game Creation (16) – .5 hours

Take **10 minutes** as a group, role-play using the game to instruct a trainee (member of your group) to the rest of the class.

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Role-Play/Simulations

- Set up
- Play
- Discussion

Reverse Role-play

Role-Play/Simulations

Confucius said:

- What I hear, I forget,
- What I see, I remember
- But what I do, I understand

Practice, practice, practice! For learning to “stick”, practice is essential. Whether you are doing it on the floor or in a simulation lab with phones and/or radios, this type of training is essentially role-playing. Role-play is simply simulation. Simulation may include the use of real equipment, but doesn’t have to. Role-play with your trainee is an important way for the trainee to put what they have learned through training, and what they have experienced through life, into the context of the new job.

Role-play is acting out a scenario where the trainee and trainer play different parts and is usually used as an exercise after knowledge and concepts have been introduced. Usually, the trainee plays the part of the position they are learning to fill, while the trainer plays the part of the caller or responder. One exception is the use of **reverse role-play**, used to instruct in the affective (feeling) domain. Allowing the trainee to play the caller or responder often results in a better understanding of the perspectives these others bring to the event.

As trainers, we cannot wait for events to happen to instill learning. Role-playing allows the trainee to experience all types of events. Lessons learned handling these ‘fake’ calls can then be transferred to real situations.

Role playing is a valuable way to put into practice knowledge that has been learned, closing the gap between training and real life. Role playing can be used for both application and analysis in the cognitive (thinking) domain. We also usually build in practical application of psychomotor skills – having the trainee use the forms, screens, or phones as they act out the scenario, or simulate keying the microphone and dispatching calls.

Role-playing can be as complex as the knowledge the trainee has. Early role-playing may focus on a few variables, while later training may include very complex role-playing. To make role-playing a successful experience, make sure the trainee has the relevant knowledge to apply.

Role plays have a goal, but not necessarily a concrete plan. The trainer has the opportunity to modify the 'script' of the role-play to guide the trainee to the learning point. Role-plays at the higher level of analysis should not suggest one 'right answer' but allow the trainee to work through the problem and all its variables.

Role playing allows for replication of relevant aspects of real-calls in a controlled environment. One aspect that is entirely controllable is the time spent on a problem. The trainee can experience longer events (such as major events and disasters) in less training time than it would take to work through the event if it were actually occurring. Or the trainer can give the trainee more time than would normally be allowed to make decisions.

This allows the trainee and trainer to perform, observe, and give feedback without time constraints getting in the way.

No matter how much reading, observing, and self-study the trainee does, they will not develop their skills completely unless they have the opportunity to apply what they have learned. For Telecommunicators, that development must come through practice and not trial and error on real calls. Role-play is an excellent opportunity for the trainee to put the various pieces of information together to accomplish a task (to practice application), without worrying about the consequences of any mistakes they may make. Role playing can be a very effective learning strategy, simulating participation within the confines of a console area or training room.

Role-play in a larger context implies suspension of disbelief on the part of the trainee – they are reacting as they would under the stresses of a real incident. Large mock scenes such as are used in Basic Law Enforcement Academy help the student to forget they are not actually on a real call. This type of larger role-play can be hard to produce within the confines of a communications center.

You can, however, simulate these kinds of role-plays by removing yourself from the visual field of the trainee. For example, calling across the room on a back-line to simulate a real phone call (and perhaps having someone else provide realistic back ground noise to the call), or by having someone else volunteer to place the 'play' calls from outside the immediate vicinity while the trainer observes only.

These types of scenes with suspended disbelief may lose the benefit of letting the student realize their mistakes while training are allowable and help the trainee learn. As such, they may be best when the trainee has reached a certain level of performance and is making fewer mistakes.

Role-plays can be used to:

- Build and integrate knowledge about:
 - Policy & procedures- Does the trainee incorporate accepted policy/procedural responses into the role-play?
 - Geography – during a role-play does the trainee understand the issues involved with the geography or demographics of the area?
 - CAD commands – can the trainee enter information into CAD during the role-play? Can the trainee use appropriate commands efficiently in order to keep up with work demands?
 - Resources – does the trainee turn to resources when applicable? Does the trainee use the CTO as the only resource? Can you encourage them during role-play to use other resources?
- Build skills-related performance:
 - Use of equipment
 - Troubleshooting
 - Equipment failure/malfunction
 - Simulated calls

Building knowledge components and skill performance into a scenario requires putting the various pieces of information together to accomplish a task and requiring the trainee to think through multiple variables at one time.

Make using policy and procedure, geography infrequent CAD commands, and resources a part of your role-play scenarios. Have the trainee use or simulate using various programs, equipment, and systems to accomplish the tasks.

Role-Play Rules

Set-Up Play Discussion

Role-plays should be prepared in advance in order to maximize effectiveness. It is important to have a plan. The plan will include:

- **The Set-Up for the Role-Play**

Identify the purpose – what areas of training are you targeting? What is the purpose?
State the learning objectives or performance outcomes you want to assess
Expectations- how you will conduct the role-play, are there any rules, etc.?

Effective role-plays have been prepared for in advance.

Identify the purpose and goals of the activity. List the primary learning objectives or performance outcomes you expect. Let the trainee know the purpose of this training session.

For a set of simple role-plays (one primary goal without complexity), keep the background the same for several scenarios (same or few units, same geographic area, same type of call if these variables do not pertain to the goal of this training session). This allows you to focus on the task outlined in the objectives. For more complex scenarios, where relationships between pieces of information are relevant, or the goal of the session, add these components back into the role-play.

Toward the beginning of training, it may be useful to use a series of role-plays on the same learning objective or issue rather than random role-plays with various learning goals. Later, random role-plays with various objectives can be used to simulate the way real calls come in. Build upon prior practice sessions and create more complex or dynamic role-plays where the trainee can safely attempt to use higher cognitive levels to manage the role-play event.

Understanding and articulating the *reason* or purpose of the role-play will help you and the trainee to be clear on the learning outcome you expect from the activity.

2. Play

Allow time
Let them try their own ideas
Let it be fun
Work through the event, allow for mistakes
Everything is winnable (no *Kobayashi Maru scenarios*)

Remember that role-playing is PLAYING. It should have an element of fun in it. Allow appropriate humor as it occurs naturally.

Give the trainee time to think though their actions while role-playing. Allow them to change an earlier action when *they* note that they are going down the wrong path. Modify your played-reaction for the new action they suggest. This allows them to work through various solutions and allows them to 'backup' from their mistakes.

Don't assume they will problem solve the same way you would. Observe how they progress using their own ideas of what can be done.

To assist in learning, restate information in different ways, reuse learning points, and allow the trainee to think through each of several related scenarios. Occasionally, change only one aspect of a repeated scenario so the trainee can think about how one changed variable can change the process of the call. If the trainee has problems with an aspect of the scenario, reuse it after giving them suggestions on a better way to process the call.

All scenarios must be winnable from the outset. If the trainee uses the knowledge they have, let them have a successful outcome to the role-play. It is only by not using what they know that they can 'lose'. Do not change a situation because your trainee is succeeding and you want to prolong the scenario. Do not make it so that no matter what the trainee does, he/she cannot win.

Often role-players do or say something hilarious and both players have to break and laugh. This just adds to the fun of the training and makes it more palatable to the adult learner. Fun or enjoyment of a training episode can enhance learning!

3. Discussion

Debrief & Discuss

Use the Feedback Model – Get, Give, Discuss

Provide specific, honest praise and corrective suggestions

Consider the use of checklists

Role-playing is only *playing* if it is not followed up with feedback. What is examined and discussed becomes learning.

Debriefing should be done after each scenario so the trainee has an opportunity for success in the next role-play. Have the trainee point out what he/she could have done better. Ask them why they took a particular action. Why in a certain order?

Be positive about what the trainee has done well, but be honest about where they need to improve. Then, go back over the mistakes and have the trainee redo the role-playing of that material. Give them a successful experience. Check what you accomplished against the purpose and goals you set for the session. Make the connection between the activity and the learning.

Consider the use of a check-list if there are multiple points you want to cover in a set of scenarios. For example, you might have a checklist for the factors used in answering a call (rings, greetings), processing the call (asked for location, callback information, correctly categorized the call in CAD, selected the correct priority) for your agency. This helps the trainer in covering all points for evaluation and helps the trainee by visually indicating what was and was not completed.

Debriefing and feedback after a role-play or simulation activity helps make learning "stick." Debriefing and giving feedback is not something trainers tack on after the learning is done as a sort of conclusion. It is an integral part of the learning process.

Role-Play Activity (17)

You have **10 minutes** to design a 3 – 5 minute role-play that will include all 3 parts to the role-play to demonstrate to the class.

Reverse Role-Play

The reverse role-play allows your trainee to put themselves in another's shoes. It can help you help the trainee build empathy and can be an effective tool when dealing with Affective Domain training topics.

As discussed earlier, reverse role-play, where the trainee plays the part of the caller or responder (or anyone they might be dealing with in their position), allows the trainee to experience what it might feel to be on the other side of the phone or radio. This is a useful technique if the trainee is getting

unexpected reactions from callers or responders due to their tone of voice, wording usage or timing (pauses).

Tell the trainee who they are going to be and what the circumstances of their event are and ask them to act it out while the trainer acts the part of dispatcher or call taker. For example, if the trainee is having difficulty understanding why callers are reacting poorly to their unsympathetic call-taking technique, have the trainee play the role of a mother/father who has recently lost a child, whose spouse is depressed and just left saying he/she was going to kill him/herself. Act as you have observed the trainee act under similar circumstances. For example, be brusque and businesslike if that appears to be the problem. Or, tell the mother/father to “calm down” if she/he becomes emotional. Tell her/him “I know how you are feeling”, when it’s very possible they *don’t* know how they are feeling.

If the trainee is impatient and loud with older callers, have them take on the role of elderly person whose spouse is lying on the bed and has stopped breathing. Let them know they are elderly and in poor health, frail and weak. Yell at the trainee/elderly caller that they “MUST GET YOUR SPOUSE OFF THE BED...NOW!!!” in order to do CPR correctly.

Reverse role-play should be followed by an examination of the reality of situations – how complex and often fluid they are. Ask the trainee how your actions affected them as the caller. Ask them how they will change the way they perform and why doing so is important.

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Self-Guided Study

- Q/A Searches
- Work Sample
- Workbooks
- Research
- **Case Studies**

Self-Guided Study

Self-guided study allows the trainee do research in the agency’s written materials and use the material to either answer simple questions or problem solve a specific situation.

Common types of self-guided study include:

- Q/A searches: Where the trainer asks the trainee a question of policy and/or application and gives him/her time to find the answer from the available resources. In order to make this problem solving, make sure you are asking questions that involve using the material from several policies or procedures, and applying it to a situation. Asking a question from a resource and having the trainee regurgitate the information is a Q/A search, but at the lower levels of Bloom’s taxonomy.
 - The use of the internet for some types of research may be useful

- The use of E-learning is also an excellent way to provide on-going training
 - EMS On-line through King County is inexpensive and offers multiple continuing education for EMDs regardless of which EMD program or vendor you use
- Work Sample: Where the trainer provides the trainee with samples of work that have been done in the past. The trainee is expected to research what was done right and wrong (usually per policy) and indicate what changes could have been made to bring the work sample into compliance. Listening to EMD tapes and critiquing the process used are examples of work sample self-study. Do not have the trainee critique their own work unless you are sure their level of confidence is sufficient. Be cognizant of the feelings of your peers if you use calls they handled. It may be necessary to slow or speed-up the tape in order to make the call-taker or dispatcher anonymous if the incident was processed poorly.

This type of self-study can be time consuming for the instructor as well. The trainer must preview all the information to ascertain that the trainee identified all issues and concerns. However, once work-study has been created, it can be used with additional trainees in the future, with no preparation but big payoffs.
- Workbooks: Written material put together on a specific subject matter, followed by a list of questions on the application of the material. The trainee reads through the workbook and then fills in the answers from the material read. By using simpler questions, without application, you can use this type of workbook for the lower levels of cognitive tasks as well.
- Research: A process of investigation. A student may be provided a subject to search or examine. The pace of the work, as well as how extensive or exhaustive their investigation is may be up to the student. Minimum required information can be identified and provided as a guide for the student's work.
- Case Studies: Work samples taken to a deeper level. Case studies are usually based on actual calls that occurred and the actions that the participants took at the time of that incident. They are usually presented in a written format. Unlike work samples, they usually cover the entire incident, not just one call or dispatch. And, they add more concepts and variables.

Critical Thinking

We want our trainees to be able to problem-solve and make decisions quickly and accurately. We sometimes call this "critical thinking". There are several definitions of Critical Thinking. For our purposes, the definition of Matthew Lipman, American Philosophy Professor (1922-2010):

"Critical thinking is skillful, responsible thinking that is conducive to good judgment because it is sensitive to context, relies on criteria, and is self-correcting."

In the context of critical thinking when dealing with calls, this definition really encompasses judgment and effective thinking.

When we talk about Critical Thinking as Robert Ennis, and Richard Paul do, we also want to incorporate that type of Critical Thinking into training. Critical Thinking with a capital C and capital T is *reflective*, thoughtful and occurs when there is a time and climate to do that. Rarely does a busy Calltaker or dispatcher have time during an event to engage in that type of Critical Thinking.

In the Adult Training Model, one of the components of the Reno Model is the daily use of trainee reflective journals. These journals are used for the trainee to write down his/her thoughts about the learning that occurred during the day. They can be formally structured so the trainee journals about the day using specific questions. An example would be, in the Basic Law Enforcement Academy, recruits use a What?, So What?, Now What?, format for their daily journals.

The CTO would read the trainee journal each day, making general comments. They do not correct the journal-they only read it

How would daily trainee journals, where they think about their learning, be of value to you as a CTO?

In our jobs, we have to be able to flex to the situation and that's where critical thinking/problem-solving/decision making is essential. Many times, there is no one or good solution. Problems present themselves and evolve as we think through them in order to solve them.

In the end, we want to help our trainees apply the information they have received at the analysis level. And, because of the nature of the job, we need to know this level has been achieved before the trainee is put in the position and allowed to prove themselves on real calls.

Several methods of instruction allow us to move to these levels.

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Case Study

- Explain the purpose
- Provide clear directions and questions
- Debrief and discuss their ideas and opinions

Case Studies

Case studies deal with real-job situations. They require higher levels of thinking. Sometimes there is no "right answer" or there are multiple other solutions. Usually, they are Self-Guided and text base, however, you can also add video or audio (recordings of calls, etc.) to make are more complex Case Study.

Case studies can be very real for the trainee as they deal with events that actually occurred, and of which the trainee may have some personal knowledge. Case studies can be created from major calls your agency handled, or from material taken from the newspapers or other agency reports.

Because of the variables in a case study, there is no one right or wrong solution to the problem. The trainee is given the material in a written format and then allowed a time period to answer questions about the case in essay format.

Trainers may create case-studies that require the trainee to do 'research' using any resources normally available to the position. This uses two methods, the Case Study and Self-Guided Study.

Rules for Case Study

- Explain the purpose
- Provide clear directions and questions – what do you want them to know? What do you want them to consider? What other information do you want them to provide?
- Debrief and discuss their ideas and opinions

Before creating a case study, you must determine what you want the trainee to learn from the session. Create a case study by identifying complex calls from your or any other agency. Build into the case study:

How and when the call or each of a series of calls was received, and what information was available at that time, to include location.

What position the trainee was working and what resources were available for them to use.

Who did what, when? Timelines?

How the event ended.

Let the trainee know you are looking for critical thinking skills and what the focus of the problem is. Provide thought-provoking questions for the trainee and ask them to write the answers in essay form:

What was known?

What was not known and where could the participant get that information?

What steps were followed?

What alternatives could have been taken?

What actions could not be taken? Why not?

What else did the participant(s) do? Why?

What would you have done differently?

You can also use this technique but build the case little by little, giving only partial information to the trainee (as the call really unfolded). Using this technique, the trainee then must ask for pertinent information and explain why they want the information. The trainer then provides the information, if indeed, it was known.

At the end of the case study, the trainee should provide you with written explanations of the process they followed to work out the scenario. You can also have the trainee verbally present their explanations if that better fits their learning style. Summarize and discuss both actions taken and not taken and the resulting outcomes. Pertinent questions might include:

How was the task accomplished?

What were other possible solutions?

Can the learning be transferred to other contexts?

How did the incident make you feel? Why?

Activity – Using a Case Study (18)

Using the case study provided, create a list of questions you would include for a trainee to answer and then discuss as follow up. You have **15 minutes**.

Problem Solving During Guided Discussion

One of the best ways to see how a trainee thinks is to give them a problem, issue, or question and observe how they work through it. Thinking processes can be ‘observed’ by listening to how the trainee describes his or her decision making and justifications. By discussing the problem and questioning their beliefs, reasons, and strategies you can help them consider all issues and perspectives in a given event.

Note that discussion should be guided, as the trainer focuses the trainee on the variables they might not have considered. *Guiding a discussion becomes both a method of observing the thinking process and letting the trainee make realizations about what process should be followed.* In order to guide a discussion onto the right path, you have to know where you are going. Know what points you want to guide the trainee to.

In discussion, if an unexpected, unworkable solution is offered, use it. Like a miner, dig a little further. Help the trainee to think about certain aspects that might make the solution less useful by asking questions. Ask them what other issues should be considered and ask about how their solutions would impact those other issues. Discussion allows for immediate feedback but that feedback should be guiding the trainee to examine their own thinking processes. Act as a facilitator, not as an information source. The use of the word *mine* is intentional. Trainers should always dig a little deeper; look for the causes of mistakes.

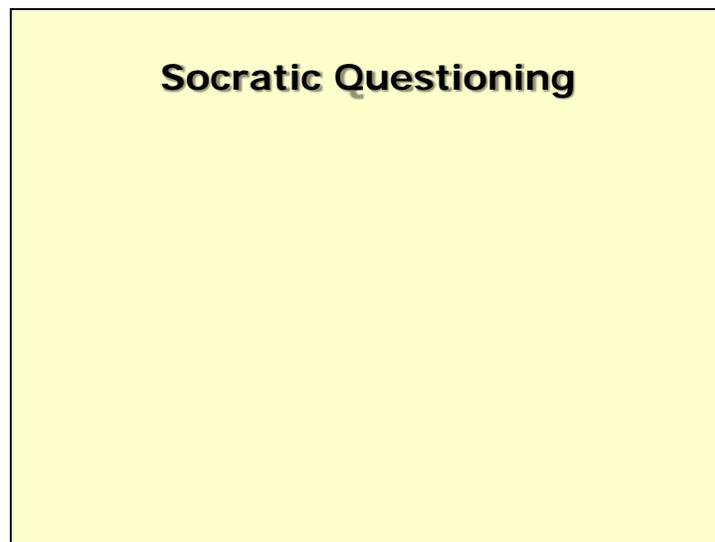
Missing elements are easy for the trainer to see as they have a larger vision of what matters in a given circumstance. It can be hard for trainers to get their trainee thinking about concerns they are not as experienced with. The trainer can ask questions that will help the trainee notice these other concerns. For example, if a trainee does not completely grasp the fact that “caller safety” can be compromised when the suggestions is made that the caller must provide information which takes them back into danger, the trainee might ask “What kinds of issues do you think could compromise the safety of the this caller?” to get the trainee to start thinking along that path. Then ask, “How can we keep the caller safe in these situations and still get information?” to continue on that path.

Build in other knowledge components when discussing a problem. Help the trainee assimilate all the various things they have learned.

It may help the process if the trainee or trainer periodically summarizes what has already been discussed, allowing the trainee to refocus on the unsolved aspects of the problem.

Note that adults prefer problem-centered learning. GGD is a win-win. The trainer can help the trainee learn in a student centered and preferred delivery method and at the same time challenge the trainee to critically think and take their learning to the next level.

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Use of Questioning or Socratic Questioning

Consider the use of questions as a way to assist the trainee in discovering new information or a different perspective on an issue. Open ended questions should be used as they encourage thinking and invite elaboration. Or, the trainer can make a statement of fact and ask the trainee to react to that statement. Then, allow the trainee the time to think about and answer the questions. Often, we wait only a few seconds before we feel the trainee does not know and we need to ‘pour’ that information from our brains into theirs. Instead, give them time and/or rephrase the question.

Questions should suggest a path of reasoning. Keep the trainee on the path by continuing with a line a questioning. Do not accept a rote answer without questioning further, even if the answer appears correct. Do not make questions too simple. You want your trainee to think through a response.

When asking questions, do so in a non-critical manner. Have a discussion beforehand with your trainee, letting them know that you will be asking many, many questions in the course of training, and that the purpose of these questions is to observe their thinking process and to challenge them. If their line of reasoning is illogical, help them to *discover* the lack of logic rather than criticizing their process. Socratic questioning is a useful technique to ‘mine’ responses.

Socrates, the philosopher, questioned everything. He felt there was no ‘truth’, that everything could be challenged. Plato, a student of Socrates, took his mentor’s techniques and used them less to challenge than to guide thinking and to teach.

Socratic questioning is a technique to help trainees become aware of what they already know. It is teaching by asking, a process that engages the trainee in reasoning for learning. Socratic questioning challenges accuracy and completeness of thinking, while helping students move forward.

Socratic Questioning:

- Allows the student to find his/her own relevancy for the material and develop critical thinking through:
 - The use of clarifying questions
 - Probing assumptions
 - Probing reasons and evidence
 - Questioning view points and perspectives
 - Probing implications and consequences
 - Questioning the questions!

Using Silence as a Companion to Questioning

It can be very challenging to a trainer to become comfortable with silence. Silence can do several things for a trainer and trainee. It allows the trainee some time to formulate a response and take some reflective moments to better answer the question. For those trainees used to having the trainer provide all the answers, it demonstrates to them that you are willing to wait for them to come up with an answer on their own. It tells them that you are willing to challenge them to reflect before responding. Additionally, a pause before continuing can be especially important for more analytical or introverted trainees. These individuals know as much as their quicker-to-answer counterparts, they just prefer to take some time to reflect and gather their thoughts before answering.

Remember the Law of Response Level:

Learners master skills and knowledge at the level of which they are required to respond during the learning process.

If your training activity requires participants to merely talk about a procedure, don’t assume that they will be able to apply it in their workplace. If you want participants to solve workplace problems, the learning activity should require them to solve problem. Challenge participants with complex, open questions that require innovative solutions. Even if you begin with simple tasks in your training activities, gradually progress to complex challenges.

Let’s take a look at Bloom’s Taxonomy of the Cognitive Domain and look at the use of questioning for the various levels within that domain.

Remembering or knowledge-level questions are usually answered by the trainee recalling specific information from memory or information readily in front of them (CAD screen of call). The information needed to answer the question is or has been given at some time.

Questions dealing with **Understanding** or comprehension ask the trainee to demonstrate an understanding of their knowledge. Again, all the information needed to answer the question is known. By answering the question, the trainee demonstrates they understand the meaning of the facts and concepts presented.

Applying questions ask the trainee to do something in applying the information they have. In order to answer the question, they must apply the facts and concepts presented in different situations. In other words, application questions ask the trainee to use the facts or concepts to solve a problem. In discussion, this might include questions like:

What would you do if...

What would happen if...

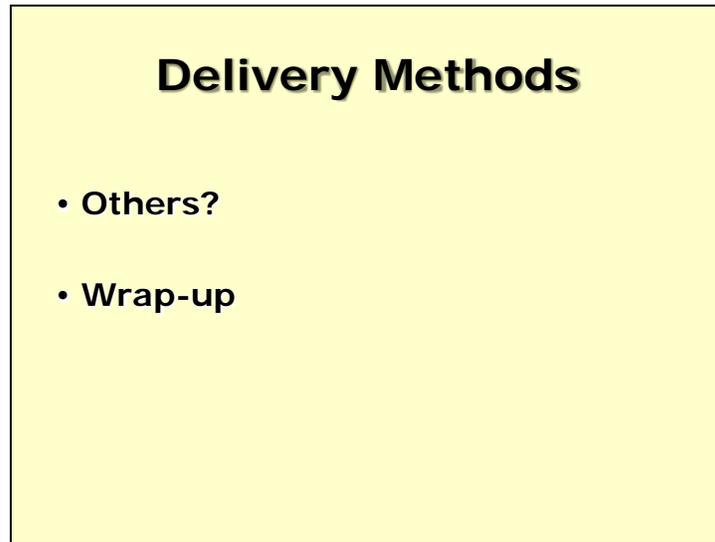
Compare and contrast this call to the last call we observed.

At the **Analyzing** level, not all information has or is provided to the trainee. Instead, they must break-down the information they have and apply it to a different set of circumstances, based on the interrelationships of pieces of information, and using their personal experiences.

Evaluating questions ask the trainee to make judgment on actions and outcomes, and to seek out information they need to answer the question more completely.

At the **Creating** level, the trainee will have to put information together to form new ideas. They are expected to organize their thoughts, ideas, and the facts and concepts provided to solve the problem. They may need to do some research so they have the necessary information to come to an answer.

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Delivery Methods

- Others?
- Wrap-up

Other Methods

What are some other methods of delivery?

Brain storming
Reading articles
Research
Field trips
Videos
Audio tape review
Lecture
Seminars
E-learning
Other?

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Unit 5 - Liability

Unit 5 – Liability

The Learning Expectations for Unit 5:

At the conclusion of this unit the student will be able to:

- **Define the concept of Limited Supervisor as used in the context of training**
- **List ways in which a trainer may become liable during a training situation**
- **Describe how a CTO can avoid liability**

You become a kind of supervisor to those you train. You have direct and immediate control over their actions. You make personnel decisions or recommendations and forward those for consideration. You evaluate performance in a permanent training record. As such you are a 'limited supervisor', with all the responsibilities and problems that come with the job. You need to be aware of supervisor responsibilities within your agency, and what processes to follow should you be confronted with problems.

Problems may range from subtle medical problems to blatant prejudice, sexual harassment toward or on the part of the trainee. Knowing your agency policy on issues like these will assist you in recognizing the need for action and beginning the proper process to deal with specific situations. Supervisors take on additional liability if they fail to perform the functions of their job. Ignore incorrect behavior, ignore policy, allow for actions not sanctioned by your agency and you may be held liable for your actions *or those of your trainee*, if you sanctioned or allowed them.

It is often easier to prove a claim made against a supervisor for an isolated incident or the misconduct of someone they are supervising than proving the government employing agency had a general disregard for supervision and accountability.

We will describe the term **negligence** as: A failure to exercise the degree of care which a reasonable person would exercise under the same or similar conditions.

Your actions will be judged against the actions others in our line of work would take under the same or similar circumstances.

All torts must prove duty, breach of duty, damage, and causation to be successful. First, the employee must have a duty to perform or act in a certain manner. An employee can create a duty when they promise to act in a certain way. This creates a special relationship between the employee

and the plaintiff. Second, they must breach that duty (not do it, or do something they aren't supposed to). Third, the plaintiff must have some sort of loss or damage. Lastly, the plaintiff must prove that the loss or damage is the result of the employee's action or inaction.

Claims against supervisors and trainers result from their responsibility for those they supervisor or train and therefore any actions taken by subordinates or those they have trained. A plaintiff may claim that the employee was not properly trained on their duties and how to perform them. As a result, the employee's actions caused some sort of loss for the plaintiff. It is likely the plaintiff will name everyone in the chain of command from the employee up to the government jurisdiction in the tort. The trainer is just one part of that chain.

Each party in the chain will likely try to claim they actually were not responsible for the wrongful act and attempt to place the blame back on another defendant.

Just doing something is not enough. The employee must 'do' to the same degree as other employees in their position – both at their own agency, the regional agencies, and in some cases within the national norm.

Compare this to "George" and the standards that apply to him. Is there an accepted 'industry' standard that most of us align our policies and procedures with?

Liability is like the game of hot potato. Everyone tries to pass it on to someone else. He who ends up holding the potato is in the worse position, and can get badly burned.

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Vicarious Liability

- Negligent Retention
- Negligent Entrustment
- Negligent Supervision
- Negligent Training

You can research some specific information about types of vicarious liability that includes:

- *Negligent retention*- when an employee is retained and allowed authority and responsibility of job duties where it was clear the authority and responsibility should not have been placed and which posed a danger to others.
- *Negligent entrustment* – when an employer entrusts an employee with a dangerous instrument and that instrument is used and causes damage to a third party. In these cases, the claimant may need to prove that an employer hired someone they should have known should not be entrusted with the "instrument". An example: the community transit organization hires a bus driver with a record of serious traffic infractions or criminal traffic infractions and that driver is involved in an (at-fault) accident where passengers are injured. The employer should have done a thorough review of the driver's driving record.

- *Negligent supervision* – is closely related to negligent retention. It occurs when a new hire is not properly supervised.
- *Negligent Training* – a failure to properly train an employee that has access to a “dangerous instrument”. It includes training a new hire not only on *what to do*, but also on *what NOT to do* in certain situations.

Generally, these specific negligence claims are brought against government entities and are considered vicarious liability issues. The blame for the error of an employee is moved up the chain of command, eventually to the government agency itself. The plaintiff is interested in being paid for their loss, and usually agencies have more money to pay out than individuals.

And, these refer to agency responsibilities. It is, for example, the duty of management to make sure unskilled, unprepared employees are not retained or entrusted with equipment and duties; that they are supervised and kept from misconduct; that the training program is valid and presented by qualified instructors; that training took place and was done correctly; that the trainee mastered the learning and was supervised afterwards.

An employee’s actions (or the trainer’s) are usually the original wrongful act that occurred to bring the tort.

Recall that often in the San Jose Model trainers make recommendations about the retention of trainees. The group who makes the retention recommendation on the Adult Training Model is the Trainee Oversight Board or Board of Evaluators. They will have reviewed all the trainees training materials, journals, weekly coaching reports, and the mid and post phase evaluation reports. The mid and post phase reports were produced by another CTO who is used specifically for the purpose of evaluation, called the Communications Training Evaluator or CTE.

A CTO or CTE must provide appropriate or sufficient information and evaluation as it may result in the termination of a trainee. If the trainer knew or should have known the trainee was inadequate to the job, but failed to pass that information on (which implies intentional false documentation), they may assume some liability for that decision. The city or county will attempt to pass the blame for the decision onto the trainer and their intentional misleading – showing how the agency did not know, and could not have known, due to the actions the trainer took. That certainly changes the way the negligence would be perceived.

Negligent entrustment is letting the trainee use equipment (dangerous instrument as described above) on their own when they do not have sufficient training to effectively use the equipment. For example, an agency having teletype machines for use with hard of hearing callers, but providing improper or inadequate training on their use. **The agency** would have negligently entrusted the equipment to its employees.

Consider what might happen if a trainer leaves a trainee at a slow time because ‘nothing is going to happen in the next few minutes anyway’ to go smoke. When the pursuit ensues and the trainee does their best, but was not adequately trained to handle the radio under those circumstances, the trainee has been negligently entrusted **by the trainer**. Agencies will most likely be able to show that policy dictates the trainee should not be left alone, so again the blame is passed back to the trainer. You are a limited supervisor. Failing to perform the tasks related to supervising your trainee increases your liability.

Negligent training ranges from not training (failure to train) to inadequate, incomplete, or incorrect training. Generally, the wrongful act of one employee does not result in claims of negligent training unless there appears to be a ‘deliberate indifference’ on the part of the agency. If the risk of encountering the type of situation stated in the law suit is known, but a choice is made not to address it in training, a deliberate indifference may be found. But what if the **trainer** improperly trains but documents completion? If the trainer is intentionally working outside the process, the government agency may attempt to place blame back on that trainer.

You may increase your liability when you train outside the scope of the training program and when your training is contrary to policy. Teach your trainee to perform the tasks in the way you have been directed.

You also increase your liability when you either don't check for learning (but document it has occurred), or you realize the trainee has not learned but allow them to pass onto the next lesson.

Trainers can also be sued by their trainees – for injuries incurred in the training, for injuries incurred later because of incorrect procedure. While our jobs do not usually incur a lot of physical risk, some agencies have their telecommunications personnel using faulty electronics, work in areas with leaky roofs with chairs that wildly launch trainees into the next console. If you know of a risk make sure you advise your trainee of it; make sure your supervisor is also informed. Do not assume they are aware.

More likely, in the completion of their duties, your trainee may commit an act or omit an act that causes injury to someone else. For example, your trainee may tell a caller to check the person in the middle of the road on the dark highway for signs of life. If the caller gets hit by a car doing so, it is possible they will blame your trainee for the injury – and then vicariously blame you for your lack of supervision in failing to correct the faulty advice. Likewise, if an officer or firefighter is hurt because of an act or inaction on the part of your trainee, you may be named.

Any time you know, or through your duties **should** have known, that an act or omission on the part of your trainee could cause harm, and you did not act to prevent harm from happening, a claim can be made you were deliberately indifferent to the injured parties rights. This is easy to do...just don't correct the trainee this time and wait for them to incorrectly perform the task again.

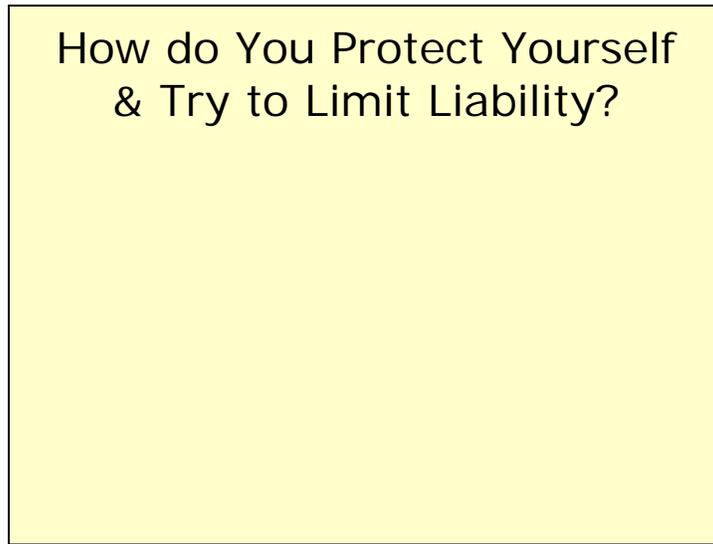
The other area of liability to which you may be exposed deals with the fair and appropriate training and training documentation a trainee receives from you. Should a trainee fail to be retained by the agency, your record keeping and evaluation of the trainee may be reviewed. It is possible that a litigation could arise from a party who feels that his/her training was somehow different or lesser-than the training received by other staff members and which led to the plaintiff's dismissal. For this reason, CTOs who receive initial and/or on-going CTO training and who follow the agency's SEGs and DORs may find themselves in a more easily defended position should a law suit arise.

One area of potential liability that deals less with training and more with behaviors of agency staff is of sexual harassment. Sexual harassment may include being directly harassed by a superior or having a hostile work environment created through inappropriate peer behaviors. Each agency should have on-going sexual harassment training provided through their Human Resources department. This *is* a type of behavior on the part of the trainer who engages in it or allows it (i.e., does not report it) or on the part of other employees, which may get your agency sued. ***Remember, if you see it, suspect it, or are told about it, you need to report it.***

In our high risk jobs, there is no guarantee that bad things won't happen and you may be named in a law suit. This material is not meant to scare people away from training. But, by knowing where the pitfalls are, and diligently applying correct techniques, liability is significantly less.

Note also, that not knowing something you **SHOULD** have known will not aid in your defense. "I didn't know my trainee was telling people to get a gun and protect themselves." is not believable or useful in court.

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Notes:

Notes:

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Protect Your Liability

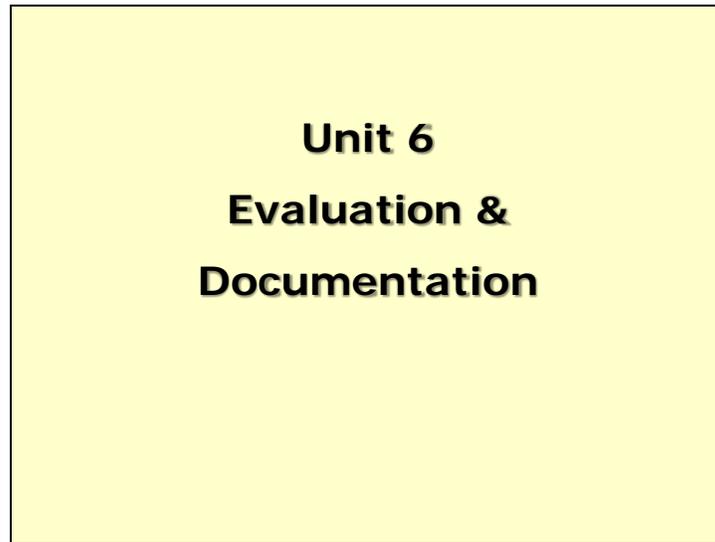
- Know how to train
- Train to your policies and procedures
- Train to the performance standard
- Evaluate for learning
- Address performance issues timely
- Train on safety issues
- Document the training, learning and performance

- Know how to train – using accepted adult learning methods
- Train to your policies and procedures
- Train to the performance standard
- Evaluate for learning
- Address performance issues timely
- Train on safety issues
- Document the training, learning and performance

First, you need to train the material. And, you need to train it correctly. Your liability is less when you train within the scope of your policy and training program direction.

In the legal world, if it isn't documented, it didn't happen. Everything that is trained and everything that is learned must be documented. Documenting learning means you have tested for the knowledge or performance and are sure it has been retained. Documenting training, without testing for learning is inadequate documentation.

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Unit 6
Evaluation &
Documentation

Unit 6 – Evaluation & Documentation

The Learning Expectations for Unit 6:

At the conclusion of this unit the student will be able to:

- Describe the reasons for formal evaluation
- Describe the San Jose model evaluation methods
 - List pros and cons of the San Jose model's evaluation methods
- Describe the Adult Training Model evaluation methods
 - List pros and cons of the ATM's evaluation methods
- Describe ways to deal with a difficult trainee

Documentation must support recommendations as to whether the trainee continues in training (retention) or is terminated.

In addition, evaluation helps an agency avoid liability by satisfying equal employment opportunity requirements that all trainees are given equal treatment in a program and that training is proper and supervised. It is imperative that a trainee is evaluated on the basis of his/her performance measured against a standard. And, that the performance standards are related to the task performed.

Formal evaluation allows you to place the trainee's process within the training material. Milestones may be set that allow the trainer to know if their trainee is generally behind or ahead of schedule at that time-point in their training. If a trainee is behind or ahead, it does not indicate they always will be. Trainees learn different types of material at different paces. More important than pace specific to task is consistent movement forward in the training.

Documentation allows the trainer to see where skills have been learned and/or where corrections are necessary. This allows the trainer to plan for future training sessions. This documentation of behavior and performance can be referred back to whenever needed, unlike informal conversations.

Lastly, documentation needs to be open and shared. Most documentation requires the trainee and trainer to both sign and acknowledge the material. Often, supervisors are also asked to review and sign documentation. How a trainee is doing should not be a secret to them – or to those who may have to make hard decisions about their future.

Evaluation includes observing behaviors, comparing them to standards and then documenting the performance. Like all feedback, it must be objective, specific, honest, and respectful.

Unlike informal casual feedback, however, it requires some preparation on the part of the trainer. The trainer should take notes during the training session – remarking on both what was done right and what needed improvement.

Most formal evaluation uses some sort of evaluation instrument or tool – sometimes a computerized but more often a written form.

This is an area where the San Jose and Adult Training Models vary somewhat and we're going to discuss it here.

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Formal Evaluation

- Test/quizzes
- Checklists
- Task lists
- DORs (used with SEGs)
- Weekly, bi-weekly, monthly report
 - Adult Training Model- weekly coaching report
- End of unit
- Others?

There are a number of ways to formally evaluate. What are they?

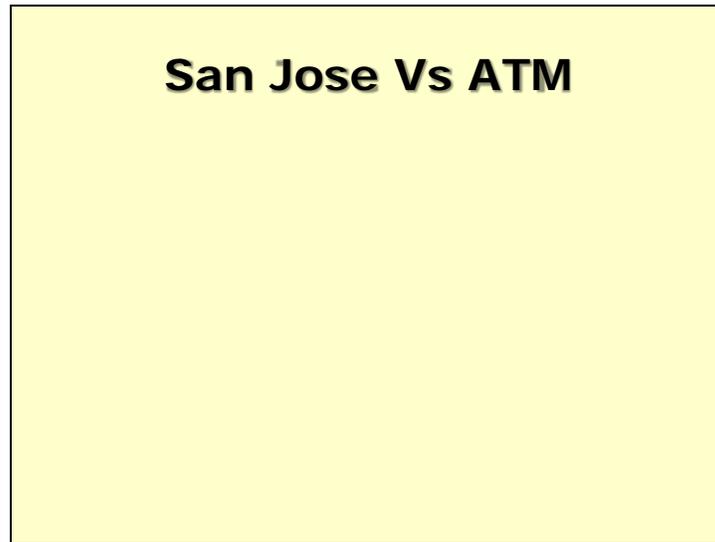
Tests may be written to solicit information about cognitive learning. They may also be performance centered in nature – to determine if skills have been learned. What kind of test is given is determined by the objectives.

Performance checklists can be useful. An observer (either the trainer or another evaluator) observes the trainee doing a task and simply checks off whether the trainee correctly performed subtasks necessary to perform the task to the standard. For example, a form may be prepared with seven tasks a call receiver must do on every phone call that included verbal exchange. The observer notes if each task was completed - answer within two rings (either did or did not), correctly identified the agency (did or did not), asked the location where help was needed (did or did not), asked what was happening (did or did not), asked about weapons and suspects (did, did not, or not applicable), asked for caller information (did or did not), and terminated the call with actions the caller should take (did, did not, not applicable). Some of these tasks may have been broken down even further (asked for caller name, address, number, and relation to call).

Task lists are written and become the curriculum (the content) that a trainee must learn and perform in their job – all skills, knowledge, and abilities they must perform proficiently. For example, a task list might include objectives or informational categories necessary to instantly recall a phone conversation using digital technology. The task list might include cognitive information (when to use the equipment, how many seconds are recallable) as well as psychomotor tasks (how to change the time, back-up, go to the next message or time period).

After the trainee has mastered the knowledge or performance involved, the element in the list is dated and signed by both the trainee and CTO. The signatures indicate that the trainee has received the information and understood it, and that the trainer has provided all information and has either observed or tested the trainee on the application.

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Evaluation Activity (19)

You will be given a packet of a week's worth of evaluations that follow the San Jose Model. Review the documents and discuss as a group the benefits and challenges of the information for **20 minutes**.

You will have a week's worth of evaluations following the Adult Training Model. Review the documents and discuss the benefits and challenges of the information for **20 minutes**.

Students will then compare and contrast the two evaluation models to identify advantages and disadvantages to each. Each group will share their findings with the class.

Evaluation for the San Jose Model:

Daily Observation Reports (DORs) used in conjunction with **Standardized Evaluation Guidelines (SEGs)** are one form of standardized performance documents. These forms of evaluation are usually associated with San Jose model of Field Training Officer programs. They are very common in law enforcement and telecommunications. Most DORs and SEGs use a **Behavioral Anchored Rating System (BARS)** approach with three anchor points defined as being 1) Unacceptable 2) Acceptable or meets standards and 3) Superior or exceeds standards. Each day, the trainee is evaluated against the performance standards in various categories such as knowledge of geography, ability to paraphrase, CAD entry, and relationships with peers.

SEGs provide the written explanation of the behaviors that characterize the anchor points. Points in between the anchor points are not defined, leaving the trainer the ability to place a student within a range.

DORs may also include information about how much training was given in a session on a specific topic, and checks for material not observed during the session, or not yet presented.

Weekly and bi-weekly evaluation and reports may be completed using the DOR or an essay format. The CTO encapsulates what training has been conducted during the week, where the trainee has met standards, excelled or needs work, and where the trainee is within the training program.

End of Unit evaluations are usually done when the trainee is ready to move onto the next module of training (either a new phase or a new trainer). Someone other than the CTO normally does this report to remain as objective as possible. The observer rates the trainee against the standards in all

categories and makes a recommendation to either release from the training module or obtain remedial training.

Not every program uses weekly or even daily evaluation formats. Other programs evaluate monthly or at the completion of a training segment. Some departments prefer to use a DOR that has no ratings, having the CTO fill in comments as the training proceeds on each call or incident that was handled. Other programs call for the trainee to research and write reports as a form of documentation.

Whatever type of documentation is used, it is important to use them consistently and fairly, training and evaluating all trainees on the same tasks and standards for performance.

Evaluation for the Adult Training Model

As a coach, guide, and mentor, the evaluating you do is less formal and more comprehensive. It is conducted through 2 primary mechanisms:

- **Reflective journaling on the part of the trainee.** The trainee journals in a prescribed way, reflecting upon their learning.
 - They may be asked to answer a predetermined number of questions. What, So What, Now What? **“What?”** is what did I learn today, what happened of consequence today. **“So what?”** is: what does this mean, why is it important? What else do I need to know? Why was this significant to my learning? **“Now what?”** is: what will I do with this information? What will I do to improve, do something different or more effective, what does this mean for the way I respond, or the action I take in the future.
 - It is kept daily and read daily by the CTO, and twice a month by the Training Coordinator. It is reviewed and read by the Trainee Oversight Board (or board of evaluators) as needed or at the end of training.
- **Journaling on the part of the CTO**
 - The CTO journal is used by the CTO to document what you observe during the course of a day. This is a less formal evaluation process than the standardized, formal evaluation that is used later in the program. This is a record of discussions, methods used to deliver training, and observations made by the CTO about training and the trainee. It is kept daily and shared with the trainee. It is read by the Training Coordinator, regularly, and is part of the packet of information that goes to the Comm Training Evaluator, and the Trainee Oversight Board.
- **Phase Focus Form Activity Log and Resources**
 - In addition to containing the Competencies with General Performance Statements, and the performance statements using 3 of the Cognitive Domain levels, the Phase Focus Forms also list and hyperlink resources (policies, procedures, training documents, etc.) to the form. It provides an electronic way for the trainer and trainee to access any relevant materials related to the Phase and Competency.
 - It also has an Activity Log that details the different methods, games, etc., used to deliver training and has a space available to log the date each time a method or activity is used. This becomes part of the training record.
- **Weekly Coaching Report**
 - The trainee picks a call for each week which s/he reviews and answers questions for each of our identified competencies (Resources, Geography, Call Processing, Communications, Interpersonal Skills/Emotional Intelligence, Equipment, and Policies/Procedures). Each competency has questions: What did I learn? What do I still need to learn? The trainee submits the report to the CTO who may add comments. It becomes part of the packet that goes to the CTE (if the agency chooses to have them review it), the Training Coordinator, and the Trainee Oversight Board.

- **Communications Training Evaluator (CTE)**
 - This is a separate CTO who act as an evaluator at 2 points during training. One is at the mid-phase or halfway through the CTO program. The other is at the end of training. This person's sole role is to watch and evaluate- for a minimum of 3 shifts and up to one week for each evaluation period. The CTE uses a set of criteria, guidelines, benchmarks, or other criteria upon which to evaluate the trainee. The CTO creates a report that becomes part of the training record, is reviewed by the Training Coordinator, and may be reviewed by the next CTO. In the ATM it is recommended that the trainee should change trainers mid-way through their CTO program, so the next trainer would review the report to familiarize him/herself with where the trainee is. This report is reviewed by the Trainee Oversight Board.

- **Trainee Oversight Board**
 - This is a group of at least 3 that may include the Training Coordinator, a non-involved CTO, a Supervisor, or an HR person. The TOB is the only body to make a recommendation to the Manager, Director, etc., about the employment determination of the trainee, i.e., release from training to the floor, continue to train, or terminate.
 - The group reviews all materials, documentation, reports, and journals. They may interview the trainee and trainers involved.

Because the documentation in this model is so comprehensive and on-going, it creates a highly defensible training record. It also requires the trainee to significantly evaluate him or herself. This model also involves others who are not intimately involved in the new hire's direct training. They should have less bias and more objectivity when gauging performance or reviewing materials.

You can see the two different approaches to evaluation. The formal evaluation takes place with a designated, trained CTO acting as a CTE to focus for up to a week, strictly on the evaluation of the trainee. This evaluation may include the use of checklists, lists with the Performance Statements to use for review, and any other form of evaluation the chosen for the program.

Potential Pitfalls in Rating

What would be some potential pitfalls in a rating system?

Notes:

Notes:

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Rating Pitfalls

- Leniency
- Over-strictness
- Recent performance
- Personal bias
- Central tendency
- Horns
- Halo

Some of the pitfalls in rating can include:

- **Leniency**
- **Over strictness**
- **Recent performance**
- **Personal bias**
- **Central tendency**
- **Horns**
- **Halo**

Leniency: When the CTO rates the trainee in categories higher than the trainee is performing. Or the trainer may feel the trainee is doing well for the time spent in training. But, we are not evaluating against time in training – we evaluate against standards set.

Stringency: When the trainer rates the trainee or categories lower than the trainee is performing. The CTO may want to appear hard to please so the trainee tries harder, may feel that no one new to the job can obtain a superior rating.

Recent Performance: Trainer allows the behaviors observed just prior to observation to influence overall rating for the period.

Personal Bias: When the CTO considers personal likes and dislikes rather than observable behaviors in rating a trainee.

Central Tendency: CTO consistently rates toward the center of the categories. Perhaps the trainer thinks the trainee is putting a lot of effort in and will get it sooner or later. Or, a CTO wants to allow room for improvement – so does not rate as high as indicated. Or, perhaps a requirement of the form is to further justify any unacceptable or superior performance.

Halo Effect: Trainer allows something good that happens in one category to influence the ratings in another.

Horns Effect: Trainer allows something negative that happens in one category to influence ratings in another.

These are *CTO* or rater errors and not errors on the part of the trainee. These occur from the perspective the trainer or evaluator. Knowing about the potential to skewer your evaluation of a trainee is halfway to preventing it.

You say to the class:

We spoke earlier about ways to document behavior. Let's talk a little more about the documentation process itself.

First, the CTO must observe or be made aware of the behavior. Trainers can use input from others as part of the evaluation as long as they can substantiate it themselves. So, if firefighters call you and say the trainee is not speaking loudly enough, you might substantiate it with the fact that a specific number of firefighters asked the dispatcher-trainee to repeat himself or, that periodic checks on the VU meter indicate under modulation.

Use quotes, call numbers, and times. Quantify information (a great difference between took 10 calls correctly and took 100 calls correctly).

Do remember that there should be no surprises during the written evaluation phase. You must give immediate informal feedback when a mistake was made, then it can be documented on the report as necessary.

Compare the observed behavior to the anchor points in the SEG and indicate the correct rating on the form.

Note any need for corrective behavior. Then, give information about the correct method and question the trainee to for their understanding. Note the time spent in training for the mistake that was made.

Review the entire evaluation with the trainee, making sure to praise as well as correct. Again, end with a positive –a look forward to where you as a team are headed.

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Challenging Trainee

- Restate and clarify your points
- Allow them to express their feelings
- Use emotional labeling
- Acknowledge feelings
- Be direct
- Avoid arguing
- Postpone until a later time
- TOB?
- Utilize interpersonal communication skills

Dealing with a Difficult or Challenging Trainee

Notes:

Challenging Trainee

Sometimes, a trainee may seem determined to disagree with your assessment of his/her performance. If the trainee gives a rational disagreement to your assessment, you may need to reexamine your perspective. Be open to new information that might change the assessment. On the other hand, this could also indicate that the trainee does not understand what you are saying. Restate and clarify your points.

If the trainee is bent on argument or closed to the feedback, denying the evaluation, you should allow them to express their feelings as long as they do not lose control. It may be useful to label non-verbal behaviors, for example, "You appear angry." Acknowledge the trainee's feeling that he/she is being unfairly evaluated (or whatever other issue is brought up). She may be convinced her actions are correct. Validate those parts of the incident in which they performed to standard. Review prior discussions or instructions about the subject matter and what the expectations are for the task performance. Stick to the facts and observable behaviors.

Be direct, state what the problem is and how the trainee did not meet expectations. Don't be vague or beat around the bush. But, do not argue with the trainee. Do not withdraw or attack. Focus on the issue and not the person and his or her presentation style. Be open to feedback that also may show you share some responsibility.

If a trainee simply will not listen or accept feedback, it may be necessary to postpone the feedback until a later time. You may need to bring in the training coordinator or supervisor to assist. Remember, to document the behavior. An inability to accept responsibility, acknowledge mistakes, accept feedback, or show accountability should be one of the criteria upon which you are documenting behavior or evaluating.

In the Adult Training Model, there is an additional resource made available to both the CTO and the trainee and that is the Trainee Oversight Board (or board of evaluators). This group, in addition to reviewing all of the trainee's materials and progress, may be convened to mediate when there is an impasse between the trainee and the trainer (or training program). If the trainee feels that he or she has not been dealt with appropriately, or is still in disagreement with the CTO (and presumably the training coordinator) about a significant issue, the TOB may convene to act as a mediating body. They will listen to both sides, review any and all documentation around the issue, and provide a solution or a determination.

Avoid phrases that start with the pronoun 'you'. They will cause the trainee to become even more defensive. "You forgot to..." "you never..." "had you done 'it'". Instead use phrases that start with "I". "I noticed that you forgot to...", "I observed that you..." or variations "It seems to me..." Sure, they get back to the 'you', but they are phrased in a less accusatory matter. Also avoid absolutes, such as 'never' and 'always'. They are seldom true and make argument possible.

Be concrete about what you are saying. Don't be general or abstract. Again, use specifics. Don't phrase things in good versus bad terms: "There is a good way and a bad way and you did it the bad way". "You were SOOOOOO slow." These types of phrases indicate you are judging the person and not the behavior. Instead, consider using terms relatively free of judgment: "The policy stated we needed to do it like this...but I observed you doing it another way" "I need you to speed up as we are not making required times." In these cases, you are comparing to a standard.

Never tell your trainee what he/she is thinking or feeling. Instead, ask them to let you know what motivated the behavior. No one likes to have someone else tell them what they are thinking. "I know you think by doing X you can avoid Y, but you are wrong." should be replaced with "It appears to me that you might be avoiding Y by doing X. Is that a correct perception?"

One of the areas you might want to explore personally when you run into these types of conflicts is to reflect upon why you find the trainee difficult. Much of the time, you will be able to point to documentation of behaviors that bear out your opinion. However, some of the time, if you take the time to reflect upon what it is that you are finding so challenging with this person, you may find that you have a value or belief that is the underlying cause. If you have a lack of specific, documentable,

egregious behaviors or performance, look more closely at your own closely held beliefs, values, or opinions to see if the difficulty may be one of communication or differing values.

Think of an example of where someone's beliefs or values may create a challenge when working with someone with differing beliefs or values.

CTOs are human just like everyone else. Occasionally we encounter people who operate in the world so differently from us, that it is hard to separate out performance and behavior, from feelings, beliefs, emotions, and values. The good news is that most of you are part of a training *team* and can look to your team members for support, encouragement, and observations which can make you a better trainer.

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