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ABSTRACT

One of 33 self-paced instructional modules for training industry services leaders to provide guidance in the performance of manpower services by public agencies to new or expanding private industries, this module contains three sequential learning activities on monitoring training programs for progress and expenditures. The first activity is designed to provide the learner with the needed background information on factors to be investigated in monitoring a training program. The second activity gives opportunity to apply the information in a practice situation, and the final checkout activity allows the learner to monitor a training program in a real work situation, such as when employed or when serving as an intern learner. Feedback devices (learner self-test and performance checklist) are included for use by the learner and instructor/supervisor to assess progress. Case study information is appended for guidance in performing the learning activities. (This module is the last of three in a group of three on monitoring training programs.) (JT)

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MODULE NUMBER X-C

MONITORING TRAINING PROGRAMS FOR PROGRESS AND EXPENDITURES

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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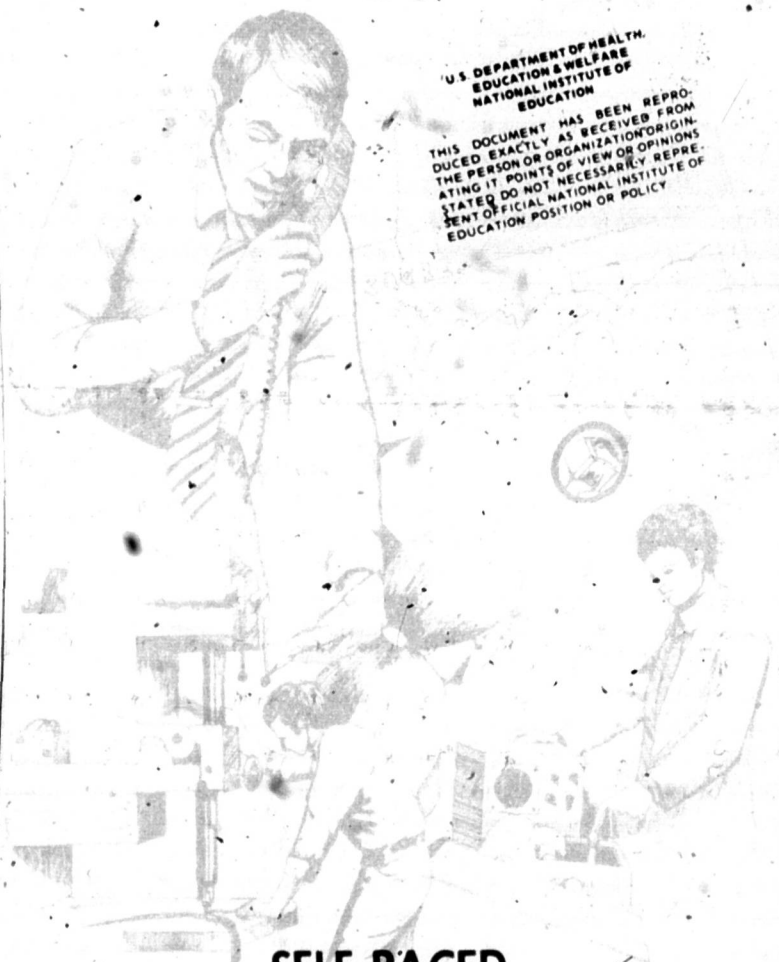

SELF-PACED INSTRUCTIONAL MODULE

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INSTRUCTIONAL PROCEDURE

This module contains two sequential learning activities and a final check-out activity. A brief overview precedes each learning activity and the final check-out activity. Each learning activity and the final check-out activity provide learning experiences to help you accomplish the objectives. Feedback devices (learner self-test and performance checklist) are provided to help you determine when each objective has been accomplished. Case study information is also provided to guide you in completing the learning activities.

The first learning activity is designed to provide you with the needed **background information**. The second learning activity is designed to give you an opportunity to apply that information in **practice** situations. The **Check-Out Activity** is the final learning activity. It is designed to allow you to monitor a training program in a real work situation, such as when you are employed or when you are serving as an intern learner. The **Performance Checklist** (Appendix A) is used by the learner and the instructor/supervisor to assess progress. The checklist is applicable for both practice performance and performance in the real work situation.

After reading the **Objectives** and the **Introduction** on page 3, you should be able to determine how much of this module you will need to complete before the **Check-Out Activity**.

* If you already have the necessary **background information** required for monitoring training programs, you may not need to complete **Learning Activity I**, p. 4
* If you already have had **practice** in monitoring training programs, you may not need to complete **Learning Activity II**, p. 13.
* Instead, with the approval of your instructor or supervisor, you may choose to proceed directly to the **Check-Out Activity**, p. 14, and attempt to monitor a training program when you have access to a **real work situation**.

Your instructor or supervisor may be contacted if you have any difficulty with directions, or in assessing your progress at any time.

SUPPLEMENTARY TEACHING/LEARNING AIDS

An effort has been made to make this module as self-contained as possible. The information contained in the module should be sufficient to develop "entry-level" knowledge and skills. However, additional information can be found on this topic. The advanced learner may wish to attain higher levels of knowledge and skills.

A list of resources which supplement those contained within the module follows. Check with your instructor or supervisor (1) to determine the availability and the location of these resources, and (2) to get assistance in setting up additional learning activities.

Learning Activity I

* Silvius, G. H.; and Curry, E. E. **Teaching Successfully in Industrial Education.** Bloomington, Illinois: McKnight and McKnight Publishing Company, 1967, pp. 300-324.
* Wheat, Elwyn G.; and Messer, B. C. **Trade and Industrial Education Teacher's Handbook.** Mississippi State, Mississippi 39762: Research and Curriculum Unit for Vocational-Technical Education, Drawer DX, 1975, pp. 113-118.
* Any of numerous books on supervision of instruction.

Learning Activity II

* (None identified)

Check-Out Activity

* Industry representative
* Administrator of vocational-technical education
* Industry services instructors
* State coordinator of industry services
* Other agency representatives assigned responsibilities for the program

OBJECTIVES

I. After completing the required reading, take the learner self-test to demonstrate you have attained the knowledge of monitoring training programs. You should complete all items correctly. **(Learning Activity I)**

II. After analyzing the performance instructions, complete all the designated experiences in monitoring a training program in a practice situation. Your work must conform to the checklist provided. **(Learning Activity II)**

III. In an actual work situation, monitor a training program for progress and expenditures. Satisfactory performance will be realized when all items on the performance checklist (Appendix A) are rated "yes." **(Check-Out Activity)**

MONITORING TRAINING PROGRAMS FOR PROGRESS AND EXPENDITURES

INTRODUCTION

In an industry services program, many activities are required to be carried out in a relatively short period of time. Several agencies may be involved in planning and conducting training activities. In order to develop the manpower needed by industry, a system of monitoring the evolving aspects of the training program is necessary.

Monitoring activities will serve as a basis for decisions about the overall progress of the participants in the training program. Accurate records of attendance should be kept. Notations will need to be made as to whether the trainees are developing proper work habits, initiatives, attitudes, and skills. This information will be of great value when the employer considers graduates of the training program for employment.

Careful monitoring of expenditures will also furnish the leader with indispensable information needed for short- and long-range planning of the training program. This unit is designed to provide knowledge and information needed by the industry services leader to monitor training programs for progress and expenditures.

LEARNING ACTIVITY I: INFORMATION

You should study the information presented in the following section. You may wish to read more on the subject from the references listed in the section on **Supplementary Teaching/Learning Aids**. After reading these materials, you will demonstrate your knowledge of monitoring a training program by completing the **Learner Self-Test**, p. 9. You will be evaluating your knowledge by comparing your self-test answers with the **Answers to Self-Test**, p. 11.

Although industry services instructors may be well-qualified and highly skilled in their areas of specialty, they will probably need much assistance during the training program. The instructors may have little or no teaching experience.

The industry services leader can have a significant impact on the teaching and learning process by establishing the necessary "helping" relationship with the instructor. Through such a relationship, the leader may visit and observe the teaching methods and techniques, and make recommendations for improvement. Provided these activities are carried out with skill and objectivity, positive results may occur in terms of instructional effectiveness, morale of the instructor, and morale of the learners.

I. TERMS UNIQUE TO MODULE

A. **Learner feedback**. Oral or written responses from the learner which indicate whether or not a knowledge, skill, or responsibility has been learned.

B. **Monitoring**. Observing, listening, checking, recommending, and assisting personnel in performing industry services tasks.

C. **Performance testing**. Checkpoints based upon tasks and standards of performance. The checkpoints provide feedback to the learner and instructor regarding learning progress.

D. **Supervision**. To oversee, direct, and manage personnel and projects.

E. **Teaching methods**. Ways of teaching knowledge, skills, and responsibilities. Same as "instructional methods," "training methods," and "instructional practices."

II. PROGRESS OF THE TRAINEES

A. Are the trainees developing the skills needed by the industry?

B. Are the trainees acquiring proper attitudes toward industrial practices and standards?

C. Are the trainees developing appreciation for industrial work?

D. Are the trainees acquiring knowledge to enter and advance in an area of specialty?

III. PROGRESS OF THE INSTRUCTOR

Experience has shown that finding time to assist an instructor after the training program has started is difficult. Providing adequate assistance in planning the instructional activities before the program opens will minimize the problems of procedural modifications.

A. Methods and techniques of instruction

1. Is the instructor prepared for instruction?
2. Can the instructor effectively present lessons, materials, and demonstrations?
3. Do learners have an opportunity to practice the skills taught?
4. Does the instructor evaluate learner progress?

B. Dedication to the instructional role

1. Does the instructor effectively assist students in learning?
2. Does the instructor use every available industry resource?

C. Classroom management by the instructor

1. Trainees
   a. Are trainees participating in all learning activities?
   b. Are trainees keeping informed of all program activities?
   c. Are trainees cooperating with the instructor and fellow learners?
2. Resources (instructional equipment, tools, and supplies)
   a. Are sufficient quantities of equipment, tools, and supplies available for learners?
   b. Are equipment, tools, and supplies properly used?
   c. Are equipment, tools, and supplies properly maintained?

IV. TRAINEES' ATTENDANCE RECORDS

A. Do the trainees know about the attendance regulations?

B. Does attendance affect training activities?

C. Does the instructor have a plan for using attendance records as one factor in trainee ratings?

V. RECOGNIZING POTENTIAL DROPOUTS

A. Chronic absenteeism

B. Poor achievement

C. General apathy toward training program

D. Family or economic problems

VI. IDENTIFYING REASONS FOR DROPOUTS

A. Industry factors

B. School factors

C. Trainee factors

D. Instructor factors

VII. PROVIDING GUIDANCE FOR ABSENTEE TRAINEES

A. Recognize specific problems with individuals.

B. Emphasize the value of the training program to the individual and the community.

C. Refer trainees to appropriate person (s) who can provide assistance.

VIII. MODIFYING INSTRUCTIONAL TECHNIQUES TO INCREASE HOLDING POWER

There may be a tendency for the pace of training programs to lag after the first week or so in instruction. This will not be the case if a tight schedule of activities was carefully planned. Prepared much like a conference agenda, the schedule should be known to all participants. The schedule should, as much as possible, be planned on an hourly basis, with activities to be performed by the instructor and trainees clearly identified for each hour of instruction. Using the schedule, the industry

services leader can more effectively supervise the instructional activities and identify breakdowns when they occur.

It is important to remember the four basic steps in good teaching—preparation, presentation, application, and testing. If these steps are not followed, modifications are urgently needed. Other principles which should be applied in a training program follow:

A. Assist each trainee to achieve and experience success.

B. Encourage instructors to challenge the above-average learners, and not threaten the slower ones.

C. Encourage enthusiasm on the part of the instructor.

D. Continuously clarify the objectives of the training program.

E. Give trainees responsibilities that necessitate their attendance and involvement in the instructional process.

F. Give recognition for progress.

G. Promote program goals.

IX. MONITORING EXPENDITURES

A. Monitoring budget

1. Interpret budget information to the appropriate industry services leaders.
2. Keep track of periodic purchases charged against the budget.
3. Determine the total balance in the budget for project operation.

B. Purchasing equipment, tools, and supplies

1. Use discretion in purchasing equipment, tools, and supplies which cannot be used in other training programs.
2. Keep accurate records of all purchases.
3. Follow through on all requisitions to prevent a slowdown of training program activities.
4. Keep accurate records on and receipts for equipment, tools, and supplies.

The industry services leader must be thoroughly acquainted with the sources of funds for industry services. Both state and local funds are usually applied to the industry services budget. Since industry growth is difficult to predict, the training

institution in larger industrial areas may want to maintain a "floating" item in the budget each year in order to accommodate unforeseen training needs.

The industry services leader must become acquainted with the most cost-effective means for planning and conducting training programs. For example, it would be less expensive to lease exotic equipment which is needed, rather than purchasing such equipment.

Gray areas of budgeting can be avoided by adequate planning during the early stages of the project. All parties in an industry services program should be involved in determining who will provide the services, how they will be provided, and when they will be provided.

Emphasis should be placed on the need for efficient, rapid decisions on budgetary problems. When in doubt, consult with your administrator or the state coordinator of industry services as soon as possible. Delays with paper work must be avoided in industry services projects.

X. DEVELOPING CRITERIA FOR MONITORING PROGRESS

A list of the potential factors to be investigated in monitoring the progress of a training program was provided in the previous pages. The industry services leader should establish criteria for each of these factors as a basis for determining if the training program is effective. Since this criteria will be unique to the project in progress, no effort has been made to develop criteria for each of the factors. However, the criteria should be developed much as standards in performance objectives. A checklist may be used to collect information about each factor.

*Continue this learning activity by taking the **Learner Self-Test** which follows.

LEARNER SELF-TEST

This is a checkpoint knowledge test needed before proceeding to monitor a training program in a practice situation. Follow the instructions given with each item. Check your answers with the **Answers to Self-Test** which follow. If you fail to complete all items correctly, you may want to refer back to parts of the module information.

1. List 3 areas of progress expected of trainees in an industry services training program.
   a.
   b.
   c.
2. List 3 danger signals that indicate a trainee may drop out of the training program.
   a.
   b.
   c.
3. Which one of the following would most likely prevent industry training programs from lagging?
   a. Training manuals
   b. Videotapes
   c. Schedule of activities
   d. None of the above
4. List 2 techniques that may increase the holding power of trainees.
   a.
   b.
5. Which of the following would most likely have an adverse effect on an industry services program?
   a. Inability of the leader to make decisions
   b. Delays in paper work related to the project
   c. Inability of the instructor to manage the training program activities
   d. All of the above

ANSWERS TO SELF-TEST

1. Any 3 of the following:
   a. Developing skills needed by industry
   b. Acquiring proper attitudes toward industrial practices and standards
   c. Developing appreciation for industrial work
   d. Acquiring knowledge to enter and advance in the area of specialty.
2. Any 3 of the following:
   a. Chronic absenteeism
   b. Poor achievement
   c. General apathy toward training program
   d. Family or economic problems
3. c.
4. Any 2 of the following:
   a. Assist trainees to achieve and experience success.
   b. Challenge the above-average learner barrier without threatening the slower learners.
   c. Encourage enthusiasm on the part of the instructor.
   d. Give trainees responsibilities that necessitate attendance and involvement in the instructional process.
   e. Give recognition for progress.
   f. Promote program goals
5. d.

*Proceed to the next learning activity for practice in monitoring a training program.

LEARNING ACTIVITY II: PRACTICE PERFORMANCE

You will be required to practice several aspects of monitoring a training program. You must read the **Case Study Information** presented in Appendix B. Then, you must complete a series of written exercises. You will be evaluating your completed work using the **Performance Checklist** from Appendix A.

I. Read the **Case Study Information** found in Appendix B. This information will serve as a basis for performing the activities which follow.

II. Answer the following questions about the training program described in the **Case Study Information:**

A. **Did the various groups involved spend an adequate amount of time preparing for the training program?**

B. **Were the responsibilities for training made clear to all parties concerned?**

C. **Were instructors trained for their assignment?**

D. **Were the training requirements specified?**

E. **Were the equipment and tools ready for use?**

(All of your answers should have been "no.")

III. Describe what you would do to correct the problems identified in the **Case Study Information.** Use the **Performance Checklist** from Appendix A to check your competency in describing solutions to the problems. All items on the checklist should be rated "yes."

*Completion of the previous learning activity should have prepared you for monitoring a training program in a real work situation. Proceed to the **Check-Out Activity.**

CHECK-OUT ACTIVITY: PERFORMANCE IN REAL WORK SITUATION

The activity which follows is intended to be conducted in an actual work situation. It may be completed without completing the two learning activities, if you have the knowledge and skills to do so.

You will be assigned the responsibility of monitoring a training program in a real work situation. In order to complete the assignment, you must perform the following activities: review the program objectives and schedules (if any); discuss the problems with all persons involved in the industry services program; obtain input from all parties concerning needed changes in the program; decide what will be corrected, how it will be corrected, and who will be involved, assist each person in making the necessary modifications; and follow-up on all aspects of the program to determine the effects of the changes. Your performance will be judged by your instructor or supervisor using a checklist. All items on the **Performance Checklist** (Appendix A) must be rated "yes."

*After completing the **Check-Out Activity**, you may select another module for study. Your instructor or supervisor may be contacted if you have any difficulty in selecting a module.

APPENDIX A

PERFORMANCE CHECKLIST

Monitoring training programs for progress and expenditures.

INSTRUCTIONS: If the performance is satisfactory, write YES in the space provided. If the performance is unsatisfactory, write NO in the space. Each item must be rated "yes" for satisfactory task performance.

1. A proper study was made of the problem. ☐
2. Input for solving the problems was obtained from all parties concerned. ☐
3. Changes to be made were clearly identified. ☐
4. The responsibilities for making the changes were clearly identified. ☐
5. A time frame for correcting the problems was specified. ☐
6. The assistance to be provided by the industry services leader during the changes was speeified. ☐

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APPENDIX B

CASE STUDY INFORMATION FOR PRACTICE EXERCISES IN MONITORING A TRAINING PROGRAM

An eight-week training program is being provided for a local industry. Three weeks of training have been completed. Trainees have begun to lose interest in the program, as evidenced by only a 65% attendance rate each training session. Twenty percent of the trainees have dropped out. It also appears that the two instructors providing the training are not able to provide sufficient instruction for the designated period of time for each training session. The instructors are employed during the day by the industry for which training is being provided.

A conversation with the industry services representative reveals that the instructors did not realize they were to provide all of the instruction. It also seems that little supervision has been provided for the training program. Instructors have been "on their own."

Detailed training manuals were provided for each job represented in the training program. The exact equipment used in the industry was provided for the training program. However, the tooling (jigs and fixtures) needed to provide complete instruction on the equipment has not been delivered. Also, some of the small hand tools needed at the beginning of the training program have not been secured.

The date for the new plant start-up has been moved ahead one month. Therefore, the industry will not be ready to employ the program graduates at the scheduled training program completion date.

The industry services leader must discuss the situation with the program participants and decide what changes must be made. The instructors will need assistance in implementing the change.

LIST OF INDUSTRY SERVICES LEADERSHIP DEVELOPMENT MODULES

I. **Orientation to Industry Services**

- A. Introduction to Industry Services
- B. Industry Services Leadership Development Program: Guide for Using the Self-Paced Instructional Modules

II. **Establishing Contacts and Relationships**

- A. Speaking to Industrial and Community Groups
- B. Writing Articles for News Media
- C. Identifying Functions of Agencies Involved in Industry Services
- D. Developing a Brochure for Industry Services

III. **Obtaining Agreements**

- A. Developing Training Agreements
- B. Developing a Lead-time Schedule
- C. Interpreting Legislation Related to Industry Services

IV. **Identifying Training Needs**

- A. Collecting Framework Production and Training Information
- B. Selecting Types of Training Programs
- C. Preparing a Budget for an Industry Services Project

V. **Acquiring Resources**

- A. Selecting Instructors for Industry Services
- B. Securing a Training Site
- C. Securing Training Equipment, Tools, and Supplies

VI. **Training Instructors for Industry Services**

Training Instructors for Industry Services

VII. **Preparing for Training**

- A. Adapting the Training Site to Training Needs
- B. Evaluating Safety Conditions at Training Sites
- C. Announcing the Opening of a Training Program

VIII. **Preparing Training Materials**

- A. Conducting a Task Analysis
- B. Developing Performance Objectives
- C. Determining Types of Instructional Methods and Media
- D. Developing Performance Tests
- E. Developing Training Manuals
- F. Preparing Videotapes for an Industry Services Program
- G. Setting Up Learning Centers for Industry Services Programs

IX. **Selecting Candidates**

Developing a Plan for Testing and Counseling Applicants for a Training Program

X. **Monitoring Training Programs**

- A. Assisting in Providing Pre-Employment and In-Plant Training
- B. Developing a Procedure for Keeping Participating Agencies Informed About Training Program Activities
- C. Monitoring Training Programs for Progress and Expenditures

XI. **Closing Training Programs**

Closing a Training Program

XII. **Placing Program Participants**

Developing a Plan for Placing Graduates of a Pre-Employment Training Program

XIII. **Evaluating Industry Services Programs**

Evaluating Industry Services Programs

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