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TITLE    A Methodology and Design for Evaluating Short-Term Training.
PUB DATE 9 Apr 76
NOTE 45p.; Paper presented at the Adult Education Research Conference (Toronto, Ontario, April 7-9, 1976).
EDRS PRICE MF-$0.63 HC-$2.06 Plus Postage
DESCRIPTORS *Evaluation Methods; Geriatrics; Gerontology; Human Relations Programs; Human Services; Inservice Education; Inservice Programs; Older Adults; Program Evaluation; Service Workers; Workshops
IDENTIFIERS Pennsylvania
ABSTRACT The methodology and design implemented for the Continuing Education/Community Service Projects of the Gerontology Center at Pennsylvania State University was the first attempt to train a diverse body of service providers in aging. Identification of the population for training was a matter of exclusion rather than inclusion, with the direct service provider within the community setting as the prime target group. The implied exclusion of service providers from the institutionalized setting allowed for focused discussions on community and familial responses to aging persons rather than on institutionalized ones. Based on the assumptions gleaned from project objectives and from the limitations of short-term training with the described audience, the development of an evaluation scheme was oriented toward providing useful information for program planning and determination of increased transferability of the information provided at the sessions to field experience. The evaluation of the Social Gerontology Project workshops included gathering information from participants at three points: just prior to every session; immediately following the session they attended; and approximately six weeks after sessions had been completed. A majority of participants reported being able to use workshop information in their daily work. Appendixes include: county participation rates, session topics, and registration and evaluation forms. (Author/LH)

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A Methodology and Design for Evaluating Short-Term Training

by

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Presented at the Adult Education Research Conference
Toronto, Canada, April 7-9, 1976
Short-term training and organized in-service educational experiences have become viable methods of up-grading and instituting new or different work skills within a group of workers, regardless of either past individual educational experiences or present job level. Familiar short-term and in-service patterns include such things as teacher education and on-the-job training in business and industry. These two settings, although different in content and outcome, do share a number of commonalities: a) the audience is usually homogeneous; b) objectives of the training session relate directly to actual work experiences that are known and documented, and c) the learning experience is generally content specific. The training of gerontological service providers, however, faced a number of problems that, although not unique, made the above just generalizations. Participants at sessions would not be homogenous. Persons attending would come from a wide variety of socio-cultural-ethnic-religious-geographic and educational backgrounds. These differences, although a contributory factor to lively sessions, meant that participants had only one perceived common factor that could be counted on, and that was their work with older adults. It could not and was not assumed that commonalities existed either in their individual work or functions of agencies within and between DPW regions in the state. The lack of perceived commonalities between participants was heightened by the fact that session objectives, unlike inservice teacher or industrial short-term training, did not usually relate to the improvement of specific work skills or the alleviation of delineated work or communication problems. It was known that gerontological service providers needed a broad range of knowledge and skills and that differences in application existed between persons within and between agencies and between job functions. Because of this, content specific training wedded to specific job function was most difficult. In a very real sense, training sessions were intended to help
service providers overcome both personal knowledge gaps and lack of understanding of the service delivery system.

In 1973, the Continuing Education/Community Service Projects of the Gerontology Center at Penn State, under the direction of Dr. Tom Hickey, were designed, The Practitioner Training and Education Program, "Society and the Aging," objectives were to provide: 24-days of short-term training. In 1974, the objectives were to:

1) continue the "24-days of short-term training" concept for the expanding number of service providers to the elderly in the state.

2) (to hold) a series of six topical workshops in each of four different locations providing geographical dispersion.

Within the objectives, two directions were provided:

(a) additional flexibility in scheduling specific topics specific target populations is provided;

(b) relating training to the needs and goals of the participant group is more easily evaluated when specific topics are focused on.

The overall rationale for this objective is to continue to meet the short-term needs of service providers while simultaneously developing long-range programs and mechanisms.

This program was the first attempt to train a diverse body of service providers in aging. Moreover, the aging services network in Pennsylvania was, at that time, just developing. Most area agencies had small staffs who had little or no prior experience in aging, though many individuals had experience
in other areas of human service and casework. A minimum staff for each area agency of four, augmented by staff from contractors and sub-contractors would, in 1974-75, provide all services within the jurisdiction of the agency. It should be remembered that the prime functions of the area agencies are to provide coordination, development, and supervision of services to older adults. Of the four prime agency positions, the Deputy Director for Program Development (or a similar title) has direct responsibility for planning, grant and contract preparation, Senior Center Coordination, and training. (SSM 52-74) Thus, it is reasonable to assume that since the State Office for the Aging had contracted with Penn State to provide basic education and training in gerontology and with other institutions and consultants to provide nutrition, Senior Center personnel training and education and management development, the more immediate and potentially more important duties of the Deputy Director would take precedence over the training function. In fact, this was the case; since, in 1974-75, every dollar an area agency earmarked for training, in reality went for support of training such as travel, lodging, food, etc., and some other agency functions. Moreover, many agencies sent only a small number of persons, while others did not support it at all. (See Appendix A.)

The bulk of state training monies came from Title IV-A, while Penn State's came from Title III. Our objectives were in line with the federal guidelines which called for the state agency to:

Make provision for the training of personnel necessary for implementation of the area plan, and the attendance of such individuals at designated training centers established by AoA, in consultation with state agencies, for individuals having specific responsibilities under the state plan. (Title III 903.81)
Therefore, when the project received funds from the Pennsylvania State Office for the Aging to provide basic education and skill training in aging, using persons of local and national reputations, it would provide the major gerontological educational experiences for caseworkers, case aides, outreach workers, as well as for many AAA administrators. Based on this broad population, a series of decisions were made that set the scope of the training sessions and which had bearing on the evaluation scheme later developed. Three of these decisions are most important: 1) Identification of the learner population and their learning needs; 2) what contents and educational mechanisms would constitute good basic education and skill training in gerontology; and, 3) what methods could be used to identify persons capable of providing the required educational experiences?

Identification of the population was a matter of exclusion rather than inclusion. Dr. Tom Hickey, Project Director, and project staff, working in close collaboration with State Office for the Aging, Regional Departments of Public Welfare Aging Specialists, and local AAA Directors, pinpointed the direct service provider within the community setting as the prime target group. Persons working in state hospitals, nursing homes, and other such institutions would not be primary participants. Although many of these persons did attend, sessions were always geared to the community worker. To keep the nursing home attendees to a minimum, no attempt was made to apply for nursing home administrator credit. More importantly, Penn State, at that time, did not offer CEU's and no attempt was made to secure them for the program. A Certificate of Attendance was presented during the first year, but in the second year this too was dropped. This is paramount, as participants received no additional job ratings or extra remuneration as a direct result of their attendance. In a real sense, the majority of participants attended
because: it was required by immediate supervisors or regional aging specialists, or as individuals they saw value in the sessions. A more realistic position is one that combines reasons and sees the participation of persons both as individuals and as representatives of their agencies. Suffice it to say that the implied exclusion of service providers from the institutionalized setting allowed for focused discussions on community and familial responses to aging persons rather than on institutional ones. In point of fact, an underlying pre-supposition of all sessions was that institutionalization, while not inherently bad, was the last resort and the least viable of all possible service alternatives. Moreover, the exclusion of a body of workers helped the sessions achieve some degree of homogeneity.

Within the population, three assumptions were made about educational needs. These assumptions can best be understood in relation to the newness of community aging programs, the diversity of aging service personnel, the variety of service problems, the multiplicity of issues and areas each provider would need to work within, and the interface between existing social service delivery systems such as the old welfare County Board of Assistance program and the Mental Health/Mental Rehabilitation system, both of which have some jurisdiction over the disposition of older adults in statutorily defined instances. Conflicts between these established systems and the new and untested Area Agency on Aging were inevitable. Though overlap was considered in planning, the day-to-day work that would place numbers of direct service providers in competition and/or conflict with these agencies needed an open forum in which problem areas could be resolved not territorially, but in terms of what's best for the older adult.

In addition, Project Staff were faced with the unusual situation in which all previous educational gerontology curricula, other than training modules, (see Mildred Seltzer, Scripps Foundation, for example) had been developed
around specific contents: biology, psychology, social work, etc. These curricula developments were, by and large, course offerings at colleges and universities leading to degrees not in gerontology but in other fields with specializations in aging. Persons to be trained under the Penn State program were field workers who might or might not hold a college degree. And, in fact, if one was held, it might be in such disciplines as nursing or social work. Demographic data collected during both years bore out the educational background assumption. Furthermore, such educational gerontology programs were relatively new and located at a few select universities: Syracuse, Michigan, USC. For these reasons, the possibility of participants having no formal educational experiences in aging was high. This, coupled with the fact that between 20-40% of participants would not be college trained, could mean that formal didactic presentations might be the least viable educational method.

Based on the problems inherent in providing training and education to this population and working within the objectives of the project and Title III, five assumptions were made about the audience:

1) Most of the participants would be new to aging since: a) few universities had programs, b) few jobs existed prior to Area Agencies,

2) Most would have had experience in other areas of human service because: a) job transferring between child and adult services, b) general community work and social work backgrounds.

3) From discussions with Area Agency Directors about their staffs, it was felt that most of the participants would be female.

4) Most participants would be caseworkers, case aides, outreach workers, etc., the people who interface with older adults on a daily basis.

5) The audience would be heterogeneous and would change in cultural and ethnic backgrounds as training sessions moved around the state.
Using the above assumption profile of participants, another set of assumptions was delineated concerning this audience's learning needs. Again, working with state and local aging specialists, four broad content categories were outlined:

1) It was felt that since community aging programs were new in the state, basic information about the aging process needed to be disseminated. For ease of specific program development, the traditional breakdown of the components of the aging process was used: biology, psychology, sociology of aging.

2) Based upon the assumptions, information about older adults as persons (life-styles, cultural, religious, ethnic differences) had to be integrated with broad contents under 1.

3) Based upon the assumptions, detailed information was needed about the aging social service delivery system.

4) Since a major aim of the project was to inculcate good work skills, i.e., intervention with older adults; techniques of interviewing, listening, reporting, record keeping, group work, and the like; these would be included as part of other informational contents rather than separated from major contents.

By broadly outlining population and learning needs, we were able to place these four content assumptions within specific workshop topics. It should be noted that the assumptions outlined held for the second year.

At the end of the first year, participants were asked to indicate their topic preferences. From these Project Staff, and again working closely with state and regional aging specialists, discussed topics within the framework of the state aging plan and priorities. Final content decisions always rested with Project Staff. (See Appendix B)
identification of learner needs, choosing contents and topics to meet these needs are one thing; but in short-term training and education, the choosing of the "right" teacher or facilitator is quite another. And, in point of fact, a wrong choice can ruin a well planned and otherwise beneficial program.

Based on the assumptions gleaned from project objectives and from the limitations of short-term training with the described audience, the development of an evaluation scheme was oriented toward providing useful information for program planning and determination of increased transferability of the information provided at the sessions to field experience. It is with these topics that the remainder of this present paper concerns itself.

GOALS OF SHORT-TERM EVALUATION

The major goal of the training evaluation was to aid in ongoing program development. Thus, knowledge acquisition, attitudinal change, and measures of satisfaction, while certainly related to program development, would not reveal and probably not be any indication of improving intervention skill. Of more immediate importance was the extent to which information and skills presented at the sessions were transferable to the job situation and were effective in solving problems or meeting situations arising on the job. In part, this assumed that the objectives of the sessions were consistent with those of the learner and those of the state. It also assumed that the topics of the sessions themselves were relevant to the job situation.

Thus, the evaluation scheme ultimately designed was an effort to assess the transferability and effectiveness of the information, the consistency of learner-program objectives, and the relevancy of material presented. Or, in the vernacular, what did we do right and how can we do it better? And, what did we do wrong or poorly and how can we correct it?
RESTRICTIONS ON EVALUATION

As is probably the case with the majority of short-term training, the 1974 "Society and the Aging" program did not operate in a climate that was always conducive to proper and comprehensive evaluation. The Project Staff faced several obstacles--some externally imposed, others internally imposed--which made the evaluative process difficult. Perhaps the most severe obstacle was the rationale and legislation under which "Society and the Aging" was funded. Title III monies and state guidelines direct that the bulk of project expenditures must go directly to training and not for activities that might be construed as research. Thus, any evaluation had to be designed as part of the training program itself and could not appear as a line item receiving its due resources. The implication of this is obvious. In order to truly assess the impact of the training sessions on job performance it would be necessary to observe participants on the job prior to and after the training sessions. Because this could be viewed as research, making funds unavailable, this could not occur. It is also questionable whether individual agencies would be amenable to such long-term participant observation. Moreover, the design of "Society and the Aging" was the source of another kind of restriction or obstacle to evaluation. As previously mentioned, topics and content for the various sessions changed depending on the region in which it occurred. So that by the end of the project all four regions had received training centered on similar topics, the evaluation had to reflect the variety of contents, regionalization and the different facilitators who presented similar information and skills.

The Social Gerontology Project, of which "Society and the Aging" was a part, handled evaluation in this manner:

The value of land-grant university projects is often measured by the quality of relationships which evolve between the university and the community constituency.
Within this thinking an objective concentrating on the evaluation of all phases and objectives of this project is proposed.

The evaluative process also suffered from a lack of previously tested useful models. A survey of the literature and available instruments yielded a large majority of designs that relied on so-called "happiness factors." While such measures would indicate that participants "felt good" about the sessions and thereby provide staff with a sense of well-being (or malaise as the case may have been), the instruments would have little developmental impact and lead to-programmatic redundancy.

It is clear, both from the overt restrictions and inherent pitfalls of short-term training evaluation and from unclear conception of the uses or procedures involved in worthwhile evaluation, that it was necessary to outline a form of evaluation that went beyond head count, happiness factor, and project reporting.

**DESIGN AND USE OF THE IMMEDIATE SESSION EVALUATIONS**

Because of the lack of a usable scheme, one had to be devised. Based upon the restrictions the project faced and the need for both a planning tool and information gathering instrument, project staff developed a three-pronged evaluation approach.

Prior to a session, participants were asked to indicate on registration forms topic preferences at the session. Penn State Continuing Education Directors were asked to tabulate the preference marks. This proved a bulky and inefficient system. The Continuing Education Directors kept a list, but by the time check marks were significant, the session was one or two days away. The main use of them was to see if participants changed their minds about why they attended
from just before the session to just after.

Immediately after a session, data was needed about participants in order to make decisions concerning changes in program, facilitation methods, speakers, as well as to begin to profile the applicability of the sessions to the work situation.

The follow-up evaluations were designed to provide data on the transferability, effectiveness and continuity of the sessions within and between regions and topics. A major thrust of the follow-up evaluations was to provide the planning base for next year relative to general contents and methods.

The pre-registration forms, as indicated, never realized their potential. However, immediate evaluations devised around demographic characteristics, objectives, speakers and prior session attendance proved to be a valuable planning tool.

The first page of this form (TRANS) asked for basic demographic information, as well as the type of agency and the individual function within the agency. It was important to know, because of additional questions relative to session applicability, whether the participant interacted with older adults and with what frequency. Of course this information enabled project staff to check whether or not the project was reaching its primary audience.

The second page of the immediate session evaluation asked participants to check their objectives (knowledge or skill) for attendance and then to rate the quality of the session in terms of their stated objectives for attending. This type of question is a departure from and expansion of the concept that participants have a general affect toward any training session that is dependent upon and/or related to whether or not their specific learning objectives are met.

The second level question, that of relating the session to the individual work situation, asks for a value judgment based not so much on the meeting of individual objectives but on the applicability of the session to the job
situation, as they understand it. In this manner, participants were asked to make decisions about levels and uses of knowledge and skill in specific contents within two important contexts: their work situation and their previous knowledge and/or skill base. The fourth question on the second page is an overall knowledge-based question designed so that participants could respond to the total-learning environment of the session, e.g., the informal and formal learning and exchanges of ideas, problems, solutions, and some venting that took place. The third page of the immediate session evaluation provided participants with an opportunity to rate the facilitators/teachers. From the outset, two things ought to be said about this rating sheet. It reverted to semantic differential scale using a High, Moderate, Low breakdown for ease of use and because the continuum allowed for a range of responses. It should be noted that the form asks variations of two basic questions. Yet, no specific knowledge claim question or response was solicited. This was because the technical and developmental nature of the presentations would make it difficult for participants who had no previous exposure to the formalized presentation of specific information to respond either to the correctness or truthfulness of the information imparted by facilitators. However, participants could and did provide another view of the information, above and beyond the quality of presentation and that was the apparent applicability to their work situation. This individual ranking of facilitators/teachers linked specific session objectives to individual learning objectives and to job situation. Not only did this provide an overview of each topic, but provided Project Staff with data from which to evaluate facilitators based on considerations other than affect. To be sure, the category "Applicable to My Work Situation" is a value judgment, but it is one based, in part at least, on an understanding of one's job and the reality of the presentation. Reality testing at short-
term training sessions and the subsequent evaluation of the real versus the ideal is most difficult. But when placed within a conceptual framework of individual participant understanding about what they do and how they do it, it forms a clearer picture of learner needs. Moreover, if a participant's learning objectives were not met, the facilitator question allowed Project Staff to focus in on possible reasons. It was important that the evaluation be consistent with the assumptions made about the audience and their learning needs. To attempt to find out if the sessions were "pleasing" or that they might have some field potential did not enhance the developmental and program planning aspects.

As an attempt to find out if previous sessions in the region had any effect on work styles, page four asked two questions. The idea behind this was, of course, to provide a first indication of the transferability and effectiveness of the sessions. The project was empowered to spend up to five dollars per session per participant on materials, books, handouts, pamphlets, etc., a package of education materials. Because of discounts and bulk reproduction, the actual figure at the sessions ran just under five dollars. However, during the year, the Project received additional requests for materials. So, all in all, it came close to its materials spending budget. Some attempt had to be made early on to find out whether or not these materials were being utilized by participants. The second part of this last question asks for a simple tally of use, and when read in light of the other questions and the change or developmental work styles, an overall profile of Project transferability and effectiveness was developed after each session.

DATA FROM IMMEDIATE EVALUATIONS

As mentioned earlier, the evaluation of the Social Gerontology project included gathering information from participants at three points: just prior
to every session, immediately following the session they attended, and approximately six weeks after sessions had been completed. The data collected just prior to every session was to provide the reasons people were attending, not only to compare with the goals of the workshop but also to pass on to the speakers to aid them in their presentations. Because of administrative and developmental factors, this was done in less than half of the sessions.

The data collected immediately after each session was to yield basic demographic information and reactions to speakers so as to check the assumptions behind the program planning and to make decisions regarding speakers for future sessions.

To reiterate the assumptions behind program planning: it was assumed the audience would be heterogeneous with regard to job function, educational background, and experience in aging. It was assumed, because of the newness of the community aging programs, that content most desired and most helpful should be basic and interdisciplinary. Data collected after every session supported these assumptions. The median level of education was two years of college, with the range extending from high school to an academic doctorate. Forty-five percent of the participants had been on the job less than a year, and 72% reported dealing with elderly clients daily. Participants were employed in at least 16 different kinds of agencies ranging from educational institutions to nursing homes to legal service agencies. And while direct service personnel made up the majority of the audience, professionals, including directors and administrators, numbered one in four.

When asked why they had attended the sessions, the vast majority of participants gave reasons that were closely tied to the objectives of the individual sessions. For example, in the sessions dealing with minority and low income, the most prevalent response was to learn more about socio-cultural patterns and their impact on service delivery. For the civil and legal series.
was to learn what protective and supportive services were. In attempting to generalize from these seemingly idiosyncratic responses, it was observed that most of these responses could be classified under the category of "gaining knowledge"—especially basic knowledge. The second most frequently volunteered reasons were those which could be categorized as learning either new skills or techniques such as intervention or therapy. When this information was combined with the fact that over 90% of the respondents reported that the sessions had been very or quite useful, that the topics were good to excellent, and that information was useful, program planners were confident that their original assumptions were accurate and that drastic changes would not have to be made in the program.

Information received regarding individual facilitators and speakers showed some variation. With the exception of one person who dealt with agency compliance to federal and state anti-discrimination policies, the overwhelming majority of participants rated the facilitators between high and moderate on all categories. The main interest here, however, is the participants' response to "Applicable to My Work Situation." As previously stated, the rationale behind this question was an early and continuous reality testing of presentations without regard to interactive techniques based on participant understanding of their work situation and the information presented. Twenty-seven facilitators were evaluated and out of 904 responses, 50 percent rated presentations as having "high applicability." Twenty-eight percent rated presentations in the high to moderate range, 14 percent in the mid to low range, and just under 8 percent rated presentations in the low range. And the facilitator mentioned above accounted for 28 percent of the responses in the low category.
THE USE AND MEANING OF DATA COLLECTED IMMEDIATELY AFTER EACH SESSION

Presenting data in toto from evaluations that were designed to provide project staff with an overview of individual sessions or a group of like sessions with specific regard to content, facilitators, and audience from the four DPW regions does injustice both to the planning process and to the evaluation scheme. It was not the intent of the immediate or, for that matter, the follow-up evaluation to produce a body of numbers, charts, graphs, or other sophisticated statistical niceties. The intent was to produce a tool that would help Project Staff answer three basic questions about future sessions based on the evaluated session.

What needs to be changed?

What should be kept the same?

Where should that change lie?

Before presenting a short example detailing how the immediate evaluations were used, Project Staff looked for two additional levels of information from the evaluations that had significant bearing on decisions made concerning future sessions. For any evaluation scheme to be effective, it should meet its own goals. That is, it should do what it was designed to do. In the same way, short-term training is designed to provide a group of learners with residual and developmental learning experiences in a content area. Project Staff were deeply concerned that integrity and continuity existed within and between sessions across DPW regions. By integrity, project staff meant that irrespective of facilitators, information and skills provided reflected accepted principles of gerontological knowledge and social service technique.

More to the point, however, that contradictions in basic information about the aging service system would, in the field, be reflected in more confusion of roles and responsibilities, just the opposite from the implied outcome of project goals. On a second level, integrity refers to the credibility of
facilitators and their dissemination of information and inculcation of skills. This second point must relate back to the worth and/or participant acceptance of the program as it relates to "applicability on the job."

The second point stresses continuity both within and between sessions. It was important that neither the level of the information changed (relevance to service delivery, language, etc.) while inconsistencies in information and skill delivery reflected interpretation rather than misrepresentation of knowledge. So that in moving from theory to practice to experience back to theory from topic to topic and from session to session basic information about the aging system, aging persons and individual and group roles and responsibilities of service providers were presented in a similar and continuous manner.

Much of the latter evaluation came directly from project staff through their roles as developers of and participant observers at all sessions. However, at individual sessions the perceived relatedness of information presented to actual job situation by participants played the central role in changing the session.

In all four regions of Pennsylvania, the project presented sessions that dealt in part or entirely with providing legal services to older adults. As you can see from the agendas, there was a distinct change from session one to two, and a moderate change from two to three, with four a setting of basic principles. These changes reflect participant evaluation and comment about the sessions, as well as project staff's growing awareness of the nature of legal services to older adults.

The move away from the contents such as "Design," "Entitlements," and the "Advocacy Role" to direct social service concerns within theory and practice outlined by persons working in the field, reflected the needs of participants who at the first session were not responsive to the intricacies
of the legal profession or the financial and legal antecedents to the services they were providing. Though a majority of the participants indicated that the information was "new," most indicated that it had little job relation. Conversely, the following sessions received high positive responses to applicability to the work situation. A similar history can be traced by looking at the "Current Issues in Gerontology" and the "Effective Utilization of Para-professionals" sessions. With regard to "Effective Utilization of Para-professionals," changes reflected a move from teaching and evaluation theories to educational needs assessment and program design irrespective of content, for in-service education. The "Working with the Elderly in Rural and Small Communities," the first session proved to be what participants had needed and reflective of their concerns and knowledge and skill needs. From the evaluations, then, project staff planned two additional sessions around similar specific contents using facilitators knowledgeable in the particulars of each region's rural older population. The correctness of this approach, guided initially by session evaluations, was borne out by future session participation and by individual session evaluation.

THE NEED FOR AND THE DESIGN OF FOLLOW-UP EVALUATION

Following twenty-one of the twenty-four days of training scheduled for project year 1974-1975, project staff were involved in activities that would shape future program years. In deciding to mail out a follow-up evaluation, a number of payoffs were hoped for in terms of better understanding the events of the current project year in relation to planning then underway for next and subsequent years. Although important and a major consideration when it came to the expenditure of project monies was any information about the long-term effect the project might be having on participants and their daily interface with other service providers and older adults. Project staff were additionally
Interested to find out if participants had changed their minds about the content, facilitators, and methodology of the sessions and to what extent and in what manner participants were sharing either the knowledge and skills or the handouts with others at their respective agencies.

**DEVELOPMENT OF THE POST-EVALUATION FORM**

From data collected through the immediate session evaluations, Project Staff developed a sense of the validity of the program as well as programmatic homeostasis. Immediate evaluations also provided a degree of insight into the transferability of the content. In developing the post-evaluation scheme, a straightforward easy-to-fill-out form was sought that allowed respondents to provide information in a number of areas and, to the extent possible, in their own words. In a significant way, an attempt was made to produce a form that was "value free" from the point of view that it would not present forced choice responses but a directed question calling for individual response.

As with the immediate evaluation basic demographic data were solicited (TRANS). Question five was an attempt to find out if responses provided from later questions were dependent upon length of work at the present job and then to length of work in aging.

When it came to objectives for attendance, it was felt that by providing session objectives as was done on the immediate evaluations would solicit force choice responses without providing insights into why an individual attended. It was felt that by requiring participants to summon the session back to conscious thought might cause the entire experience to be recalled rather than a single aspect. In point of fact, the question requires a cognitive and affective answer.

In question three, the concept of "useful" is important as it attempts to determine whether or not participants were able to use the information in
daily work without regard to whether or not individual objectives were met.

This was followed by questions concerning format, facilitators and presentation. Moving from general questions about the design of the session to three questions about transferability. One dealing with the sharing of information and handouts, the second with the "reality" of the information vis-a-vis actual work, which was different from information that was "useful." For example, the theory of aging that argues for cell mutation might be "useful" to know but not very helpful in terms of daily work experiences and in solving work related problems. Finally, a question asking about personal use of the handouts. Project Staff believed that this form, when analyzed in conjunction with the immediate evaluations, would provide a solid planning base for future project years. Before discussing the use of the forms as planning tools, some interesting data were collected from the post-evaluations that impacted upon understanding of the project, the audience, and their educational needs.

DATA FROM FOLLOW-UP EVALUATIONS

In order to truly assess the impact of Society and the Aging on participants, it would be necessary to follow them back to their jobs to see if what they were exposed to at the sessions resulted in any changes in their job performance. The reasons why this was impossible have already been discussed. It was possible, however, to approximate this impact through the use of a follow-up questionnaire distributed approximately six weeks after the first 21 days. Since there was no need, from a methodological perspective, to include all participants in this survey, four sessions representing four topics, held in each of the four regions, were chosen as a sample base. A total of 215 individuals were mailed surveys.
The survey solicited information in four areas: demographic, to assure our sample was representative; objectives, to check to see if the respondents still reported their reasons for attending to be the same as immediately following the sessions; impact and transferability, to ascertain how much and in which ways participants were carrying back to their jobs information provided at the sessions; and planning, to gather recommendations on how to improve the program.

The major discrepancy between this follow-up evaluation and those collected immediately after the sessions was an over-representation of high-level administrators and directors responding to the follow-up evaluations. We concluded this was due to the fact that many of these persons often attended only parts of these sessions and did not remain to complete evaluation forms. After correcting for this over-representation, there appeared no significant differences on demographic data between the follow-up and the immediate evaluations. There were also no significant differences between sessions and, therefore, between regions. Thus, any differences noted later could be assumed to be arising from the peculiarity of a particular workshop and not because of a difference in individuals.

As was the case in the immediate evaluations, participant desire to gain general and specific knowledge about aging and aging programs was the chief reason most people reported for attending the sessions. Again, no differences appeared across regions, sessions, or individuals.

The most important parts of this follow-up survey from the perspective of a planner are the sections dealing with transferability of content and with recommendations for continued program development. Approximately three quarters of those who responded reported that the information presented in the workshops was useful in their daily work and reflected actual work experiences. This was true across all workshops in all four regions. Of more
importance to us was the applicability of the material presented for problem solving on the job. Fifty-three percent of the respondents reported that the information presented enabled them to solve job-related problems or handle more effectively job-related situations. Again, there were no differences between workshops or regions.

As we reported earlier, approximately five dollars was spent per individual per session on materials and handouts designed to be taken back to the job site to be used as aids and shared with fellow workers. We were interested to what extent this material reached colleagues or how many simply filed it away. We were quite surprised and pleased to learn that almost 90% of the participants used the materials on the job or shared them with their fellow workers. Over half reported the materials and sessions were discussed in formal staff meetings, while another third reported it was discussed informally over coffee or on breaks. It was obvious to us, then, that the information and materials presented were reaching far more than the 1487 people who attended.

Finally, and most important to the planning process, Project Staff wanted some reaction by the participants on how the sessions could be improved. To get at this three questions were asked. First, if they were to reorganize the sessions, what would they change? Second, if they were to change the methods of presentation, what would they change. And third, to what extent was the information presented by the facilitators understandable? What we were after was some idea of the effectiveness of the organization of the session, the effectiveness of the speakers to get the ideas across, and whether or not the level of content was appropriate for the audience. To answer the last question first, 91% of the respondents reported that the information presented by the facilitators was highly understandable or understandable most of the time. And there were no significant differences across workshops or across regions.
With regard to the recommendations for change, however, some interesting differences did appear. First of all, between 25 and 30 percent of the respondents wrote in that they would change nothing. Most included comments supporting the present organization. For those who did suggest changes, the recommendations varied from session to session. One session centering on "Minority and Low Income Problems of the Elderly" received recommendations to change personnel. The session was held in an urban setting where participants were sensitized to the plight of minority groups and the fact some of the speakers were not of that culture was viewed as a deficiency in the program. One-third of those responding to this question recommended changing the personnel as compared to 0, 0, and 4.3% for the other sessions. On the other hand, the impact of the content itself can be seen in another session devoted to "Civil and Legal Problems of the Elderly." The participants came to the session with very specific questions on a wide range of topics even though the session advertised a general introduction to the topic. When asked what they would change, 22% of the respondents from this session reported they would change the content as compared to 5, 16, and 14 for the other sessions.

Interestingly, when asked what changes they would make in the methods of presentations, those respondents from the "Minority and Low Income" session who had recommended changing personnel now suggested at a higher rate than all other workshops that more audiovisual aides should be employed. More to the point, however, this session was one of three that used extensive audiovisual materials. The "Civil and Legal" session, whose content was criticized by a minority, was encouraged to provide more small group discussion—obviously to promote more question and answer opportunities. Thus, these last few questions gave us a good idea as to what changes should be incorporated into the next year's program.
USE OF DATA COLLECTED FROM THE TWO EVALUATIONS

As previously discussed, the main use of the immediate evaluations was to provide project staff with a mechanism for continued development of specific sessions and as indicators of project effectiveness. The post-evaluations did very much the same, but from different perspectives. Eleven-hundred-sixty-six different people attended the "Society and the Aging" training sessions during 1974-75. Three-hundred-twenty-one attended more than one session, many attending all six days held in their region. Project Staff could only assume that the next year would be as well, if not better, attended. Yet the audience would be subtly different. It would contain many of the persons who had participated in the past year, as well as persons who attended a number of summer institutes in aging around the country, including the one sponsored by the Gerontology Center at Penn State.

Based on prospects of continued funding under Title III, changes in the learner population, a number of newly mandated services, and the data collected, training objectives were proposed for 1975-76 project year that outlined a project that would provide a variety of learning experiences designed to meet the needs of persons who previously attended sessions, as well as the needs of those who did not attend or who were recently hired. Sessions were divided into basic and intermediate basic aging and an introduction to the service delivery system and older adults as persons for the latter group and work-skill development and improvement sessions centered around groups of similar services for the former group and for persons who attended the first series. Of course, since the sessions would be open to any individual working in aging within the state, these categories were somewhat arbitrary but useful in planning as they served as indicators of knowledge dissemination and skill acquisition levels of particular sessions. It was anticipated that this additional information about sessions would encourage participant self-selection and lead to even greater session homogeneity. In addition to the two direct training
objectives outlined above, three others were proposed. The first dealt with
the formalization of regional training councils and the inculcation of skills
that would lead to long-range planning of educational needs within the region
and the identification of local and regional colleges to provide a portion of
the education. The last part of this objective was tied to the "Faculty De-
velopment Series in Gerontology" that was focusing on developing local and
regional institutional capabilities in aging, either on an individual institu-
tional level or in consortia with other institutions.

The second dealt with the development of in-service training capabilities
within the Area Agencies, through the identification and training of in-service
educators and the providing of in-service educational materials.

The last objective of the proposal was a technical assistance model that
would provide in-service educators, agency directors, and others with current
information on programs, applied research, changes in regulations and the like.
Project Staff believed that this five-pronged comprehensive training approach
would facilitate the development of ongoing basic and developmental training
within agencies and colleges. From project evaluation scheme it was learned
that evaluation helps to understand what ought to be done but enables a
focusing on what can be done.

GENERALIZABILITY OF THE EVALUATION SCHEME

For those training programs faced with adequate funds, not restricted by
legislation, and blessed with ample personnel a much more comprehensive and
conceptually "tighter" evaluation scheme may be designed. However, for those
conducting short-term training facing similar constraints to those of "Society
and the Aging," we believe our evaluation design, with, of course, appropriate
modification for the individual topic, represents a model that is generally
applicable. This applicability exists, we believe, because the design serves both as a planning aid and a research tool. By collecting data at three points, namely prior to, immediately after, and after an extended time, some quasi-experimental control is achieved in determining the impact of the sessions. By referencing the evaluation to specific session objectives, the objectives of the learner, and the transferability and effectiveness of the content to the work situation, valuable information for future planning is gained.

To reiterate the design, data collected prior to sessions helps to determine participants' expectations, as well as competencies and deficiencies, so that sessions may be planned for maximum benefit. For short-term training involving multiple sessions, evaluation immediately after each session is necessary for minor adjustments in the program, especially when outside speakers and facilitators are utilized. Finally, a follow-up evaluation occurring some time after all training is completed allows the planner to assess, albeit somewhat indirectly, the extent to which the sessions have been carried to the work situation. Or, even more importantly, which specific aspects of individual sessions have had the greatest transfer to the work situation—transferability to the work situation being the ultimate goal of short-term training. Finally, the evaluation described above sets no value on the training or its components but relies on the individual participants to describe what happened and what was useful.
## Appendix A

### Participation Rate by County*

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*Due to incomplete or missing addresses or participants from out of state, county total is slightly lower than actual participation rate.*
Appendix A (Continued)

List of Organizations Represented at Society and the Aging Administration on Aging
Adult Homes
Area Agency on Aging
State Office for the Aging
Meals on Wheels
Homemaker-Home Aides
Mental Health-Mental Rehabilitation
Senior Centers and Clubs
County Board of Assistance
Base Service Unit
Foster Grandparent Program
Housing Authority
Nursing Homes/Rest Homes
State Hospital
Visiting Nurse Association
Health Services
Community Action Agencies
Educational Institutions
American Red Cross
Community Service Organizations
Nutrition Programs
Religious Unspecific
Legal Services
Appendix B
Survey of 1973-1974 Society and the Aging Participants

Future Session Topic Preference

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<td>Services to Rural Areas</td>
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<td>Social Policy and Legislative Issues</td>
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Southeast Region

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<td>Gerontology (Biology, Sociology, Psychology of Aging)</td>
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<tr>
<td>3</td>
<td>Minority and Low-Income Elderly</td>
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<td>4</td>
<td>The Elderly in Family Context, e.g., Family Counseling Roles</td>
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Appendix B (Continued)

Society and the Aging 1974-1975 Series

Final Session Dates, Topics and Contents

Date: January 21-22, 1975
Topic: "Mental Health and Counseling with the Elderly"
Content:
- Psychiatric Profile of Older Adults
- Clinical Practice with Elderly Clients
- Current Developments in Geropsychiatry
- Working Effectively with Elderly Adults
- Psychological Crises and Intervention Strategies
- The Counseling Relationship
- Interview Skills
- Counseling Techniques
- Family Counseling

Date: January 28-29, 1975
Topic: "Mental Health and Counseling with the Elderly"
Content:
- Psychiatric Profile of Older Adults
- Community Mental Health Programs for Older Adults
- Psychiatric Day Care for Older Adults
- Workshops on Counseling
- Psychological Crises of the Adult Years
- Working with the Aged
- Session on Audiology
- Communication and Counseling
- Mental Health Services
- Sexuality of Older Adults
- Ethics of Intervention

Date: February 11-12, 1975
Topic: "Mental Health and Counseling with the Elderly"
Content:
- How Should Social Service Providers Assess and Meet the Needs of the Elderly in the Community
- Process Groups (both days)
- Analysis of Delivery Systems
- Characteristics of Mental Illness in the Elderly
- Techniques of Intervention and Elements Necessary for Service Delivery
- Discussion
Appendix B (Continued)

Date: February 28-29, 1975
Topic: "Mental Health and Counseling with the Elderly"
Content:
- Psychiatric Profile of Older Adults
- The Sick Role of the Elderly and its Counseling Consequences for the Mental Health and Social Service Worker
- Current Issues in Mental Health
- Working with the Ill Elderly
- Sexuality and the Older Person (both days)
- The Growth Element in Aging
- Methods of Treatment in a Non-Institutionalized Setting
- Working with the Mentally Impaired Older Adult
- Discussion of Ethical Implications of Intervention, Patient Rights and Family Welfare

Date: March 11, 1975
Topic: "Effective Utilization of Paraprofessionals"
Content:
- Task Analysis
  - New Careers
  - Program
  - Practice
  - Evaluation
  - Implementing the Technique
  - Evaluation Techniques
  - Paraprofessional/Professional Relationships
  - In-Service Training Designs

Date: March 13, 1975
Topic: "Working with the Elderly in Rural and Small Communities"
Content:
- Overview of Rural Elderly in Northeastern Pennsylvania
- Methods of Using Existing Services in Rural Areas and Organizing Older Persons in Rural Areas
- Surveying the Needs of the Elderly in Small Communities--Methods and Procedures
- Isolated Older Adults, Family Relationships, Older Adult as a Person, and Breaking Stereotypes about Rural Elderly
- Working with the Elderly in Rural and Small Communities
March 18, 1975
Topic: "Effective Utilization of Paraprofessionals"
Content: Task Analysis - Introduction to the Technique for Development of Effective Staffing
Building Relationships through Effective Staff Communication
Evaluation Models
Staff Supervision
Value Clarification

April 10, 1975
Topic: Task Analysis - Technique for Development of Effective Staffing
Strategies for Effective Team Development
Implementing the Technique to Resolve Local Problems
Evaluation
Paraprofessional/Professional Relationships
In-Service Training Designs

April 15, 1975
Topic: "Civil and Legal Problems of the Elderly"
Content: Designing Legal Service Systems
Protective/Supportive Services and the Rights of Older Clients
Entitlements of Older Persons
The Advocacy Role
Panel Discussion

April 29, 1975
Topic: "Working with the Elderly in Rural and Small Communities"
Content: People-to-People Relations in Rural Communities
Who are Rural Older Americans and What are Their Needs?
Methods of Surveying the Needs of Rural Elderly
Getting Services to Rural Elderly
Effective Communication with Older Adults

May 6, 1975
Topic: "Effective Utilization of Paraprofessionals"
Content: Methods for Assessing Learning Needs/Objectives
Techniques of In-Service Education
Special Information Needs of Service Providers
Evaluation Techniques
Staff Communication
Appendix B' (Continued)

Date: May 8, 1975
Topic: "Working with the Elderly in Rural and Small Communities"
Content: Problems of Rural Older Persons
Community Action in Rural Areas
Breaking Stereotypes about Older Persons:
Isolated Older Adults, Family Relationships
Putting Theory to Work in Practice: A Simulation on
Meeting the Needs of Rural Older Adults
Implications for Service Delivery

Date: May 13-14, 1975
Topic: "Minority and Low Income Elderly"
Content: Older Adults as a Minority Group
Poverty in Southeastern Pennsylvania: How it Affects
the Lives of Older People
Income Maintenance
Health Care
Neighborhood Service Support Systems
Older Black Americans
Older Women
Films - Dr. Chang and Mrs Trinidad - Chinese and Spanish
Speaking Elderly
Delivering Services to Older Persons in Suburban Areas
Older Jewish Americans

Date: May 22, 1975
Topic: "Civil and Legal Problems of the Elderly"
Content: Protective/Supportive Services - What are They: A
Planning Approach
Practical Considerations: A Service Provider's View
Series of Work Groups:
  a) Should Protective Services be mandated?
  b) Should Involuntary Intervention be Allowed?
     Issue: If so, Under What Circumstances?
  c) Is There Conflict Between the Needs of the Individual
     and the Needs of the Community?
     Issue: Who (And Why) Should the Agency Serve?
  d) What Supportive Services are Necessary to a Functioning
     Protective Service?
     Issue: How Much or How Little Can We or Should We Do?
  e) What are the Worker Characteristics and Personnel
     Policies Needed?
     Issue: Training
     Monitoring
     Accountability
     Bonding
     Malpractice
  f) What Other Agencies Should We Relate to in Order to
     Implement Protective Services?
     Issue: Building Relationships Between Aging Agencies
     Overlap
     What Non-Aging Service Systems Should We Relate To?
     Group Reports and Putting the Reports Together
Appendix 8 (Continued)

Date: June 10, 1975
Topic: "Community-Based Day Services"
Content: Geriatric Day Care - What, Why, How?
The Geriatric Institution as a Member of the Service Delivery System
Community-Based Services
Homemaker-Home Health Services
Multi-Purpose Centers
Outreach/Information and Referral
Institutional Perspectives

Date: June 12, 1975
Topic: "Current Issues in Gerontology"
Content: Future Trends in Gerontology: The Politics of Aging
Current and Pending Legislation
Alcohol and Drug Abuse/Misuse
Crime and the Elderly: A Community Perspective

Date: September 18, 1975
Topic: "Current Issues in Gerontology"
Content: Current and Pending Legislation
Consumer Problems/Issues Facing Older Adults
A Lawyer Talks About Protective Services - A Follow-Up Session
Cultural and Ethnic Minorities of the Northeast Region

Date: September 23, 1975
Topic: "Civil and Legal Problems of the Elderly"
Content: Protective/Supportive Services: A Planning Approach
Practical Considerations: A Service Provider's View
a) Should Protective Service Agencies Intervene Involuntarily?
   Issue: If So, Under What Circumstances
   If Not, Why
b) When There is a Conflict Between the Needs of the Individual and the Needs of the Community, Who Should the Protective Services Agency Serve? Why?
c) What Concrete Supportive Services Should Protective Services Agencies be Capable of Providing?
   Issue: Provide Directly
   Arrange for Services Through Other Means
d) What Other Agencies Should Protective Services Agencies Relate to in Order to Implement Services?
   Issue: Relationships Between Agencies
   Overlap
   What Non-Aging Service Systems Need to be Related to?
Reports, Discussion, Observations, Clarifications
Appendix B (Continued)

Date: September 25, 1975
Topic: "Current Issues in Gerontology
Content:
Protective/Supportive Services: A Planning Approach
Protective/Supportive Services: A Service Provision Approach
Workgroups on Community-Based Day Services

Procedures
Methods
Techniques
Evaluation

Educational Experiences in Gerontology
WORKING WITH THE ELDERLY
IN RURAL AND SMALL COMMUNITIES

May 8, 1975
DuBois Campus, College Place
DuBois, Pennsylvania

PURPOSE
This workshop is designed to provide information about socio-cultural attitudes, service delivery systems, and social service needs of older persons living in both rural farm and nonfarm communities, and in small towns and cities. Specific discussions and workshops focus upon:
1. Socio-cultural Patterns
2. "Hooking-into" Existing Systems
3. Family Relationships
4. Advocacy
5. Designing Services for Rural Elderly

PARTICIPANTS
This program has been designed for older adults and for those who work with older adults in any of the following activities:
- Advocacy
- Social Services
- Volunteer Work
- Advisory Committees
- Health Services
- Educational Programs
- Counseling
- Information and Referral Services
- Housing Programs
- Senior Centers
- Outreach Programs

COSTS
A registration fee of $1 includes coffee breaks for the day. Lunch is on your own. The major costs for the conference and materials have been provided by the Pennsylvania Office for the Aging. Please mail the attached registration form before May 6, 1975. Registrants will receive an acknowledgment letter which will include travel details and reserve workshop materials.

REGISTRATION FORM
SOCIETY AND THE AGING
May 8, 1975
DuBois, Pennsylvania

PLEASE DUPLICATE THIS FORM FOR MORE THAN ONE REGISTRATION. REGISTRATIONS SHOULD BE RETURNED NO LATER THAN MAY 6, 1975.

Registrations are limited and accepted in order received.

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Telephone

My workshop and discussion group preferences are:
( ) Isolated Older Adults, Family Relationships, and the Older Adult as a Person
( ) Breaking Stereotypes About Rural Older Adults
( ) Working with Older Adults in Smaller Communities
( ) "Hooking-into" and Identifying Existing Services
( ) Working with Older Adults in Rural Communities

Registration fee of $1 includes coffee breaks.
Please enclose check for $1 payable to The Pennsylvania State University and mail to:
Mr. Dennis Lott, Assistant Director, Continuing Education, The Pennsylvania State University, DuBois Campus, College Place, DuBois, Pennsylvania 15801.
### Personal Data

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</table>

**Highest Education Completed:**
- High School or less
- Some College
- Bachelor's
- Master's
- Doctorate or beyond

**I work directly with older persons:**
- Daily
- Often
- Little

**I work in an agency whose PRIMARY function is:**
- Health Care
- Counseling
- Nutrition Services
- Information & Referral
- Legal Services
- Planning
- Housing
- Education
- Transportation
- Multi-service Centers

**My job classification is:**

**I have worked at my present job:**
- 0-1 yr.
- 1-3 yrs.
- 3-5 yrs.
- over 5 yrs.
I came to this session to gain knowledge about: (Check the one(s) that fit best.)

- Socio-cultural Patterns and Their Impact Upon Service Delivery
- Meeting the Needs of Older Women, Widows, Widowers
- Older Adults as a Minority Group
- Ethnic Minorities
- Financial Considerations
- Other (specify)

In terms of meeting my stated reasons for attending, the session was:

- Excellent
- Good
- Poor

In terms of my job, I found the information from today's session to be:

(a) ___ highly useful ___ useful ___ not useful
(b) ___ very specific ___ specific ___ general
(c) ___ previously NOT known ___ both new and old ___ previously known

I think that in this session I learned: (Check one.)

- a great deal
- quite a lot
- little
- nothing

* Contents changed depending upon the contents and topics of each session.
I found ____________'s presentation:

- Thought-Provoking:
- Stimulating:
- Well-Delivered:
- Informative:
- Applicable to My Work Situation:
- Coherent:

Overall, this speaker related to me:

Each speaker had a separate form.
Please answer the following questions for each of the workshops previously held this year which you attended.

<table>
<thead>
<tr>
<th>Mental Health and Counseling of the Elderly</th>
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<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Very often</td>
<td>Occasionally</td>
</tr>
<tr>
<td>Explain:</td>
<td></td>
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<table>
<thead>
<tr>
<th>Effective Utilization of Paraprofessionals</th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Very often</td>
<td>Occasionally</td>
</tr>
<tr>
<td>Explain:</td>
<td></td>
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</tbody>
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<tr>
<th>Civil and Legal</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>Very often</td>
<td>Occasionally</td>
</tr>
<tr>
<td>Explain:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

As a result of the workshop, are you doing anything differently?

How often have you used the handouts from the session?

* Titles of past workshops changed depending upon regional schedule.
Dear Participant:

The Continuing Education staff of Penn State's Gerontology Center is now planning educational activities for the coming year. Records indicate that you attended the above workshop. Your reactions regarding this workshop and suggestions for future workshops will aid us in this planning. Please complete this form and return it to us in the enclosed stamped, self-addressed envelope. Your cooperation and prompt reply is greatly appreciated.

I WORK SETTING

1. As part of your job, how often do you have direct contact with older adults?
   - at least once a day
   - one to three times a week
   - less than 4 times a month.

2. Of the following functions, WHICH ONE is the PRIMARY FUNCTION of the agency in which you work?
   - Counseling
   - Education
   - Health Care
   - Housing
   - Information & Referral
   - Legal Services
   - Multi-Service Center
   - Nutrition
   - Planning
   - Transportation
   - Other (specify)

3. What is your job title?
4. What are your chief duties, tasks, and responsibilities, etc?

5. How long have you held this job?
   - less than a year
   - 1 to 3 years
   - 3 to 5 years
   - more than 5 years

6. Prior to this job, did you work in the field of aging? yes no

7. If "yes," how long?

II WORKSHOP OBJECTIVES

1. What were your objectives in attending this workshop?

2. For each objective EXPLAIN how the objective was or was not met.

3. Did you find the information presented in the workshop useful in your daily work? yes no
   Comments:

4. If you were to reorganize the workshop, what would you change, leave the same, etc? Explain
5. To what extent was the information presented by facilitators understandable?
   ______ Highly understandable
   ______ understandable most of the time
   ______ understandable some of the time
   ______ not at all understandable

6. If you were to change the method of the presentations, what changes would you make? Explain


7. Have you shared with your fellow workers the handouts and information presented at the workshop? ______ yes ______ no.
   If "yes," under what setting (i.e., staff meetings, over coffee, etc)?


8. Did the information presented reflect actual work experiences?
   ______ yes ______ no Explain


9. Did the information presented enable you to solve problems or meet situations on your job? ______ yes ______ no Explain


10. How often have you used the handouts from the workshop?