

## Key to the Toolbox: A Participants' Guide to the *Moving Ahead* Training Program

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### I. Welcome to *Moving Ahead*

Welcome to the Head Start Phase IV *Moving Ahead* competency-based training experience. This innovative approach to professional development for Head Start staff is designed to support competency development or enhancement in skill areas critical to the continued success of Head Start.

The overall objective of *Moving Ahead* is to engage participants in a learning experience that takes a different approach from traditional training programs. The approach has several key features.

1. It places emphasis on learning versus training. In a traditional training environment the focus is predominantly on what the trainer provides in the way of information, knowledge, and skill development to the participants. *Moving Ahead* provides a more learner-centered environment in which participants take the primary responsibility for their learning by determining what they need to learn, selecting the appropriate materials, engaging in the learning activities, and planning for continued competency development.
2. It builds on the principles of competency-based learning. *Moving Ahead* incorporates the essential elements of a competency-based approach to training to allow learners to identify learning needs and assess their current knowledge and skill levels as measured against specific job performance requirements, to provide curricula that focus on work-specific situations and incorporate opportunities for participants to learn skills within the context of those work-specific situations, and to establish a structure for continuing knowledge and skill mastery beyond the initial training, through practice and application of knowledge and skills in the workplace.
3. It designs curriculum materials that are responsive to a variety of learning styles and settings. The *Moving Ahead* materials incorporate readings, activities, and exercises that can be used by individuals or groups, with or without a facilitator.

The following pages provide you with materials you will need to become familiar with the *Moving Ahead* curriculum.

## **History of the *Moving Ahead* Project**

The Phase IV *Moving Ahead* Training Program represents the Head Start Bureau's continuing emphasis on management and leadership training for local grantees. It also grows out of recommendations of the Head Start Committee on Quality and Expansion, which recommended additional training for federal staff. This program, like the Phase III *Mastering Change* curriculum, benefits from the input of the Work Group on Federal Staffing, Staff Development, and Training.

## **Objectives for This Training**

Participants who use these training materials will;

- identify their skill-building needs within a situation-based context that is relevant to their on-the-job performance needs
- consider the relevance of the identified skills to each performance situation case and to ongoing job needs
- enhance skills applicable to a number of on-the-job situations through the skill-building sessions
- practice their newly acquired skills through Head Start job-related simulations
- work individually and in pairs or small groups with other participants

## **The Training Approach: What is CBT?**

The *Moving Ahead* training differs from traditional "stand-up" trainings in which participants mainly receive knowledge and information from trainers. This training is learner-centered, with a focus on building skill competencies in specific areas of job performance, engaging participants in active learning, and facilitating learning through self-directed activities.

Competency-based training (CBT) is an approach that is used to develop or enhance specific skills related to critical job functions so that the learner can perform those functions with an optimal level of proficiency and competence. Using the CBT model, we have identified job functions within Head Start (at the program and federal levels), isolated the critical skills needed to carry out those functions, and identified the competencies required for skill building in those areas. This training will not address an infinite array of topics; rather, it will engage participants in developing specific skill competencies through smaller learning increments that will provide an opportunity for participants to learn and apply what they learn.

The CBT approach requires that participants engage in an active learning process and make a full commitment to learning by doing. Participants have an opportunity to experience a variety of learning methods, including individual and group activities, and to engage in real-life problem solving. It is also important to note that participants bring with them the most critical element for a successful learning experience, their experience and expertise, to use and share with others during the learning activities.

Most of the activities are self-directed. This means that instead of having a trainer stand in front of the room, imparting knowledge and information or giving guidance and

direction, participants receive detailed instructional materials. Participants work through the materials at their own pace, although suggested time frames for each area of instruction are provided.

### **Benefits for Participants**

This approach to training has many advantages for program and federal staff who are seeking an alternative or addition to traditional trainings. It

- provides a format for competency development that can be implemented consistently across all of Head Start
- is self-directed, allowing flexibility of use and a cost- and time-effective means for staff development without the added costs for travel or trainer support
- is designed around Head Start Job Performance Situations, to focus on the specific job competencies needed to function well in these and other Head Start situations
- allows participants to identify their own skill-building needs through self-assessment keyed to the Job Performance Situations
- is case-based, allowing participants to contribute their own experience and knowledge, as well as new skills learned, to finding solutions
- uses a range of teaching and learning strategies, to provide variety and accommodate different learning styles

Realizing all of the advantages that this approach has to offer requires that participants be open to learning in a different way and improving the process as we go along. As the lead for implementing the training program, you will want to ask staff to approach the training with an open mind and a commitment to full participation.

## **II. What Can You Do to Support Training**

### **Ways to Implement *MOVING AHEAD***

In your local program or federal office, there are several ways that learners can participate in the training. Each kind of grouping has its advantages and disadvantages.

#### **Individual Self-Study**

The simplest way, logistically, is for an individual to pick up the materials indicated by the Self-Assessment and work on them entirely at his or her own pace. The materials allow for this. However, the individual who works entirely alone may find it harder to complete a course of training than if there were at least one partner; and he or she misses out on the richness of learning that comes from discussion and exchange of ideas.

#### **Pairs and Small Groups**

Participants who join forces with at least one other learner who is interested in pursuing the same course of training benefit from having a partner without incurring heavy burdens of scheduling and coordination.

## **Larger Groups**

The materials do provide an opportunity to bring together a cadre of staff to participate together in a training experience. You can structure this experience to allow participants to select activities from across the entire training package, or to concentrate on one or two selected Job Performance Situations. Logistically, this may be more of an administrative challenge. It may also present more of an opportunity. Even if they are working side by side individually or in pairs/small groups, by taking the time together, engaging in discussions, and building a common vocabulary and understanding participants may maximize the learning outcomes. And the benefits gained by hearing one another's ideas can be significant.

## **Ways to Support Training in Local Settings**

The actual learning grows out of each participant's interactions with the materials, but it is the leader who creates a climate and situation in which learning can occur. In local grantee programs and federal offices around the country, leaders who implement the training program can take a number of steps to ensure that their managers and staff use the materials and profit to the maximum from what they have to offer.

### **Promote the Package**

- publicize the materials
- discuss the package with other staff leaders; explore ways that they can promote the package
- hold an awareness meeting—use the overhead transparencies in the Appendix and distribute copies of *Key to the Toolbox*
- use Head Start 101: History, Values, and Regulations as a sample activity

### **Create a *Moving Ahead* Toolbox for Your Organization**

- place the master copies of the written materials in three-ring binders to facilitate handling—you may choose to include all materials in one three-inch binder or place materials for each Job Performance Situation in a binder of its own
- engage other staff in helping you to create local audiotapes and videotapes to supplement the written training materials by using the scripts and cases provided
- display the toolbox in a location that will encourage staff to browse through the materials
- encourage staff to use the master copies to make copies for themselves

### **Support Staff in Doing the Self-Assessments**

- emphasize the value of the Self-Assessments, which allow participants to develop their own learning plans
- decide on ground rules: for instance, Self-Assessments are confidential, or participants share Self-Assessments with their supervisors as part of professional development discussions and performance review

## **Provide Structure and Release Time for Participants**

- determine how information from the Self-Assessments can help shape an organization-wide training plan: for instance, if most staff identify the need to build skills in communication and decision-making, you may wish to structure a special training event for Job Performance Situation 3: Decision-Making: Building Consensus
- decide on ways to offer: as individual self-study, pairs/small groups, or large staff development group
- plan ways to schedule: in some locations it may work best if staff participants self-schedule their *Moving Ahead* activities over a span of weeks or even several months; in others, you may decide to use the training package as an opportunity to bring staff together for an intensive training event

## **Be Ready To Answer Frequently Asked Questions**

- familiarize yourself with the content and structure of the training package
- refer to the section on frequently asked questions that appears in the Notes for Facilitators section of this document

## **Ways to Support Staff as They Integrate New Knowledge into Existing Work**

Skill development is a continuing process. *Moving Ahead* provides participants with opportunities to assess their competency level in skills that they identify; begin to build or enhance their competency in their selected skills; and practice those skills in the application exercise. However, true competency—the ability to consistently use the skill appropriately in the workplace—is achieved through practice. Leaders play an important role in helping participants continue to build their skills after they have completed *Moving Ahead* activities.

If you are a mentor or supervisor, you can support participants by discussing ways in which they can integrate their newly acquired skills into their ongoing practice as quickly as possible after the training event. This discussion signals to the participant that you value the investment of time and effort that they made and that you will support their efforts. In addition, you can support participants by

- providing them with opportunities to practice in low-risk situations
- giving feedback on the use of their new skills in the workplace
- suggesting books, articles, knowledgeable colleagues, or other resources that may provide the learner with more information

### **III. A Tour of the Toolbox**

The *Moving Ahead* toolbox contains master copies of all the materials needed to carry out the training. The materials currently consist of six modules, each one organized around an important job function that Head Start and Early Head Start staff and leaders face. Each of these modules is illustrated in a Job Performance Situation case and is used as the jumping-off point for you to build skills in several categories. The modules are:

Orienting New Staff

Program Systems and Supporting Fiscal Management

Building Essential Skills in Facilitation, Decision-Making, and Communication

Building Collaboration in Head Start

Promoting the Vision of Head Start

Improving Program Quality through Program Monitoring and Self-Assessment (this module is being updated to reflect new monitoring protocol)

In addition to these six modules and the skill-building activities associated with each one, there is an activity called Head Start 101: History, Values, and Regulations. This module provides grounding in Head Start history, values, and regulations, and can be used to help you become familiar with the approaches and formats of the activities in each module.

## **IN THE TOOLBOX . . .**

The toolbox leads off with a document called *Key to the Toolbox*. It includes an overview of the Job Performance Situations and the activities linked to each one. It provides participants with directions on completing the Learning Plan. In the beginning, participants can use the Learning Plan, in tandem with their Self-Assessments, to identify and record the activities they will pursue. After they have completed their course of study, they can revisit the Learning Plan, in tandem with their Post-Assessments, to consider next steps for using these skills in the workplace. Within each of the six modules are the following sections, each keyed by a letter.

### **A. Case and Self-Assessment**

This section provides a case—a true-to-life, work-related situation that mirrors what Head Start leaders currently experience on the job. It focuses on a particular aspect of Head Start work (e.g., orienting new staff or promoting the vision of Head Start).

This section also includes a Self-Assessment form for that module, designed so that participants can assess their current level of competency for meeting expectations in each of the related skill areas. Participants are asked to identify the major gaps between their current skill level and what is ideally expected, then use this information to specify the skills they will concentrate on learning. These are recorded on the Learning Plan that accompanies the Self-Assessment.

### **B. Case Activity**

This section offers a structured small group activity, designed to guide participants toward considering the challenges of the Job Performance Situation and understanding the importance of developing the related skill competencies. The section asks participants to draw on their own experience to consider how the presence—or absence—of the related skills has affected organizational operations in similar situations. Participants who are completing the package on their own may choose to discuss the case with a colleague to get another perspective.

### **C, D, E, F, and G Skill-Building Activities**

Each of these is a skill-building activity, related to the Job Performance Situation case in A and B. (The number of skill-building activities varies from module to module.) All the skill-building activities are organized in the same way. Each activity begins with a Reference page that lists skill competencies and cross references the activity with others in the training curriculum. An Overview specifies the expected participant outcomes, lists materials needed to complete the activity, and itemizes the components with a suggested time frame for each. Each activity uses several types of learning strategies, such as background readings, handouts, and worksheets. A worksheet may lead to a pen-and-pencil exercise or possibly a role play or group discussion, and sometimes to an audiotape or a videotape. At the end is a Summary: it reviews critical learnings and asks participants to specify how they plan to use those learnings back in the workplace and identify additional skill development that they may need.

## **X. Application Activity**

In this concluding activity for the module, the case is expanded into a self-directed exercise. It gives participants an opportunity to take what they have learned through the skill-building activities and apply it to a true-to-life work-related situation. The Application Activity may combine case study and analysis, role play and group discussion. Participants who are working alone will need to complete all skill-building activities in a Job Performance Situation to successfully complete the Application Activity. Participants who are working in pairs or in small groups will bring multiple sets of experiences to the Application Activity; for instance, several participants may pursue Job Performance Situation 3 by working through the Fundamentals of Leading Meetings Activity while several others carry out the Building Consensus Activity.

The Application Activity concludes with a Post-Assessment. Participants can use it to (1) identify increased competency in the selected skill categories, (2) identify ongoing needs for skill development, and (3) update their Learning Plans for long-range development.

Exhibit A provides an At-a-Glance Chart of the Job Performance Situations, skill categories, and specific skill-building activities linked to each one. (Note: the Job Performance Situations are currently numbered 1, 2, 3, 4, 5, and 7. These were the Job Performance Situations considered a priority; we may develop other modules in the future.)

Exhibit B provides a Finding-It-Fast Chart with an alphabetical listing of the skill categories and skill-building activities, and the related Job Performance Situation.

Exhibit C provides an overview of the expected participant outcomes for each skill-building activity.

Exhibit D presents a flow chart of the sequenced training process.

**Exhibit A**  
At-a-Glance Chart

**Head Start 101: History, Values, and Regulations**

Job Performance Situation 1: Orienting New Staff	Job Performance Situation 2: Supporting Fiscal Management	Job Performance Situation 3: Building Essential Skills in Facilitation, Decision-Making, and Effective Communication	Job Performance Situation 4: Building Collaboration in Head Start	Job Performance Situation 5: Promoting the Vision of Head Start	Job Performance Situation 7: Improving Program Quality Through Program Monitoring and Self-Assessment
1–A, Case: The Region Self-Assessment	2–A, Case: Child and Family Services Head Start Self-Assessment	3–A, Case: The Hillside Challenge Self-Assessment	4–A, Case: Metro-City Early Head Start Self-Assessment	5–A, Case: Symmington Head Start Self-Assessment	7–A, Case: Harmony Springs Self-Assessment
1–B, Case Activity	2–B, Case Activity	3–B, Case Activity	4–B, Case Activity	5–B, Case Activity	7–B, Case Activity
1–C, Staff Development and Training: New Staff Orientations	2–C, Fiscal Management: Understanding and Applying Basic Cost Principles	3–C, Facilitation: Fundamentals of Leading Meetings	4–C, Collaboration: Managing Your Role	5–C, Conflict Resolution: Understanding the Elements	7–C, Program Monitoring and Self-Assessment: Leading a Program Monitoring or Self-Assessment
1–D, Staff Development and Training: Leading a Guided Discussion	2–D, Fiscal Management: Linking Budget Development to Program Planning	3–D, Decision-Making: Building Consensus	4–D, Collaboration: Negotiating and Formalizing Agreements	5–D, Presentations: Developing Effective Presentations	7–D, Program Monitoring and Self-Assessment: Collecting Data Using Multiple Sources
1–E, Individual Development: Giving Feedback		3–E, Communication: Effective Spoken Communication	4–E, Influencing Others: Applying Basic Skills		7–E, Planning: Using Assessment Data
1–F, Individual Development: Developing Learning Plans		3–F, Communication: Active Listening Skills			
		3–G, Communication: Effective Writing Skills			
1–X, Application Activity: The Region	2–X, Application Activity: Child and Family Services Head Start Program	3–X, Application Activity: The Hillside Challenge	4–X, Application Activity: Metro-City Early Head Start	5–X, Application Activity: Symmington Head Start	7–X, Application Activity: Harmony Springs



**Exhibit B**  
Finding-It-Fast Chart

**SKILL CATEGORY**

**BUILDING ACTIVITY**

Collaboration	4-C, Managing Your Role 4-D, Negotiating and Formalizing Agreements
Conflict Resolution	5-C, Understanding the Elements
Communication	3-E, Effective Spoken Communication 3-F, Active Listening Skills 3-G, Effective Written Communication
Facilitation	3-C, Fundamentals of Leading Meetings
Financial Management	2-C, Understanding and Applying Basic Cost Principles 2-D, Linking Budget Development to Program Planning
Program Monitoring and Self-Assessment	7-C, Leading a Program Monitoring or Self- Assessment 7-D, Collecting Data Using Multiple Sources
Individual Development	1-E, Giving Feedback 1-F, Developing Learning Plans
Influencing Others	4-E, Applying Basic Skills
Presentations	5-D, Developing Effective Presentations
Planning	7-E, Using Assessment Data
Decision-Making	3-D, Building Consensus
Staff Development and Training	1-C, New Staff Orientations 1-D, Leading a Guided Discussion

## **Exhibit C**

### **Participant Outcomes for Skill-Building Activities**

#### **1-C New Staff Orientations**

- understand the role and benefits of new staff orientation
- apply a three-step process to the orientation of new Head Start staff
- design an initial orientation session for a new staff person
- assess the effectiveness of new staff orientation efforts

#### **1-D Leading a Guided Discussion**

- identify opportunities in which a guided discussion is an appropriate staff- development strategy
- develop discussion questions based on learning objectives
- select a discussion stimulus
- use questions, call patterns, body language, and visual aids to manage a discussion
- use a three-step process to respond to incorrect answers
- develop action steps to incorporate what has been learned into ongoing work

#### **1-E Giving Feedback**

- understand the basic principles and guidelines of giving feedback
- determine when feedback is needed
- select the appropriate type of feedback to fit the needs of new staff
- elicit helpful feedback from new staff regarding their orientation experience

#### **1-F Developing Learning Plans**

- identify four types of skills and knowledge needed for a specific position
- assist staff in assessing their own training needs through a questionnaire and an interview
- have information on Head Start staff-development resources
- conduct a staff-development interview
- develop an individualized Learning Plan that contains goals, learning strategies, and action steps
- identify ways to support a staff-development culture in one's organization

#### **2-C Understanding And Applying Basic Cost Principles**

- define programmatic and fiscal intent of basic principles relating to allowable and reasonable costs, direct and indirect costs, allocable costs, and use of non-Federal share resources
- identify sources of guidance for the appropriate application of cost principles
- understand how basic cost principles are applied during program reviews
- demonstrate the application of principles to specific Head Start financial management situations
- determine what constitutes appropriate use of matching funds.
- identify common errors regarding the allocation and use of Federal resources

## **2-D Linking Budget Development to Program Planning**

- establish a team approach to budget planning and development
- identify and implement critical planning tasks for budget development
- use standard program planning information to establish cost objectives
- select the appropriate budget type to meet program needs
- engage staff in budget monitoring and cost containment

## **3-C Fundamentals of Leading Meetings**

- describe the elements of facilitation
- understand the strategies and skills required to achieve successful meetings
- apply facilitation skills to a Head Start situation

## **3-D Building Consensus**

- use a simple framework for conducting consensus-building discussions
- identify common barriers to consensus building
- apply strategies to overcome these barriers
- provide guidelines to assessment team members on ways to prepare for efficient team meetings
- effectively share team decisions with program staff

## **3-E Effective Spoken Communication**

- determine when the content of a message is clear
- identify any clashes between verbal and nonverbal messages
- recognize when communication is being blocked
- demonstrate how communication can be kept open and moving forward
- identify opportunities for demonstrating respect and building rapport
- recognize when cultural differences and personal factors will impact communication

## **3-F Active Listening Skills**

- determine one's capacity as an active listener
- demonstrate active listening skills
- employ effective techniques for paraphrasing to clarify meaning
- understand the barriers to active listening

## **3-G Effective Written Communication**

- understand the importance of good writing skills to their Head Start job functions
- identify areas for improvement in their current style of writing
- set the proper tone for a written document
- select the appropriate wording and phrasing for expressing the intent of specific written documents
- identify and correct common grammar, punctuation, and spelling errors
- determine the appropriate format for note-taking and writing memos, letters, and reports

#### **4-C Collaboration: Managing Your Role**

- define and prepare for the role of the convener, leader, or broker in a collaboration
- assess the developmental stage of an existing collaboration and devise strategies for moving the collaboration forward
- identify potential community partners and strategies for beginning a dialogue with them
- clarify the limits of authority as the organization's representative
- articulate the organization's expectations to partnering organizations
- communicate the benefits and costs of being involved in a partnership

#### **4-D Collaboration: Negotiating And Formalizing Agreements**

- approach negotiations from a win-win perspective
- prepare to negotiate by analyzing their organization's positions, interests, and BATNA (best alternative to a negotiated agreement)
- anticipate their partners' interests and positions
- determine roles on the negotiation team
- follow a six-step negotiation process in a case example
- analyze the completeness of written agreements using a list of common elements

#### **4-E Influencing Others: Applying Basic Skills**

- recognize the value of social marketing as a strategy to improve services for children and families
- identify areas of influence in specific Head Start collaborations
- recognize the importance of successful collaboration of targeted, ongoing communication
- apply a step-by-step process to the promotion of a collaboration
- identify and utilize resources within their own organizations and the wider collaboration to accomplish the work

#### **5-C Conflict Resolution: Understanding the Elements**

- recognize the symptoms, sources, and stages of conflict
- recognize one's personal style for handling conflict
- add new strategies to one's conflict-resolution repertoire
- use a sequential process for assessing and resolving conflicts
- apply conflict-resolution skills to a Head Start situation

#### **5-D Developing Effective Presentations**

- describe the elements of effective presentations
- use two models to plan and design a presentation
- select appropriate visual aids and support materials
- adapt four kinds of charts to use as needed for graphic presentation of quantitative and qualitative data
- practice the three components of good "platform skills"
- apply strategies to overcome speaker fears
- use a checklist to critique a presentation

### **7-C Leading a Program Monitoring or Self-Assessment**

- articulate a compelling vision for the program review or self-assessment or review both to review team members and grantee staff
- develop a plan for achieving the vision
- identify characteristics of strong team members
- create a climate of respect during the assessment
- identify strategies that team leaders can use during different stages of team development
- use a formula for responding to staff complaints during a review

### **7-D Collecting Data Using Multiple Sources**

- describe the strengths and limitations of different data sources in conducting a program review or self-assessment
- conduct a group interview
- build rapport with the person being interviewed
- keep accurate records of interviews
- conduct an observation
- keep accurate records on observations
- analyze and interpret data from multiple sources

### **7-E Planning Using Assessment Data to Inform Planning**

- identify the three basic elements that make up all types of plans
- use a common planning acronym, SWOT, to analyze assessment data
- distinguish between strategic and operational planning develop goals and SMART objectives

## **Exhibit D**

### Flow Chart of the Training Process

#### **Step 1 Pre-Training Planning for Participants**

Informational materials presented to participants to introduce the process

#### **Step 2 Setting the Context for Competency Development**

Overview of the Job Performance Situations (A)

- Real-life work situations to guide competency development

Complete a Self-Assessment (A)

- Determine competency development needs

Develop a Learning Plan

- Identify skill-building activities

Review and discuss Job Performance Situation Cases (B)

- Deepen understanding of link between competency and job performance

#### **Step 3 Skill Development**

Participate in skill-building activities

- Engage in skill building (C, D, E, F, and G)

#### **Step 4 Application**

Participate in Application Activity (X)

- Apply skills learned
- Post-Assessment

#### **Step 5 Planning for Workplace Follow-up and Support**

Plan for continued development and use of skills in the workplace

### IV. Step-by-Step Description of the Training Process

Participants move through a sequential process that includes several phases.

#### **Step 1. Pre-Training Planning for Participants**

Before you begin the training, you will receive an introduction to the process. You may take part in a session in which a facilitator walks you through the Competency-based Training (CBT) model, the toolbox, and the materials. You may also participate in the sample activity Head Start 101: History, Values, and Regulations, which will initiate you into the approach and format of the training activities. If this pre-training session is not offered, you can orient yourself to the package by carefully reviewing the steps below.

## **Step 2. Setting the Context for Competency Development**

As the training begins, you will start to use the toolbox materials in a particular sequence.

### **A. Case and Self-Assessment**

Working on your own and at your own pace, you will complete this section, which provides a case—a true-to-life, work-related situation that mirrors what Head Start leaders currently experience on the job. It focuses on a particular aspect of Head Start work (e.g., orienting new staff or promoting the vision of Head Start). The activities are guided by the following instructions:

1. You will first read the case, which requires that staff have a distinct set of skill competencies in order to act effectively.
2. You will then answer a series of questions and rate your current skill level for each of the skills needed to address this situation.
3. After rating your skill level for each of the skills in the Job Performance Situation, you will decide which of the skill-building activities in the Job Performance Situation you want to pursue, and you will record your choice in the tally section of the Self-Assessment.
4. After completing the tally section, you will transfer your decision to the Learning Plan that accompanies the Self-Assessment. If you are completing the Self-Assessment for one specific Job Performance Situation, your task is complete, and you are ready to begin the training activities. If you are completing all six Self-Assessments at one time, you will repeat Steps 1 to 4 for the five remaining Job Performance Situations.

### **B. Case Activity**

If you are completing the training as part of a group experience, you will assemble with other participants who have chosen to work on, say, Job Performance Situation 1, *Orienting New Staff*, and the skills associated with it, into a Job Performance Situation group (or, if working individually, work through the materials on your own). This section offers a structured small group activity, designed to guide you toward considering the challenges of the Job Performance Situation and understanding the importance of developing the related skill competencies. It asks you to draw on your experience to consider how the presence—or absence—of the related skills has affected organizational operations in similar situations.

## **Step 3. Skill Development**

You and other participants from your Job Performance Situation group are now ready to move on to form skill-building groups.

### **C, D, E, F, and G Skill-Building Activities**

Each of these is a skill-building activity, related to the case in A and B. (The number of skill-building activities varies from module to module.) You may decide to choose 1—C, *New Staff Orientations*. Another participant may choose *Leading a Guided Discussion*; others may choose *Giving Feedback*; and still others may choose *Developing Learning Plans*. You will join with those participants who have selected the same skill-building activity, take up copies of the

materials for that activity, and follow the directions.

All the skill-building activities are organized in the same way. Each activity begins with a **Reference** page that lists skill competencies and cross-references the activity with others in the training curriculum. An **Overview** specifies the expected participant outcomes, lists materials needed to complete the activity, and itemizes the components with a suggested time frame for each. Each activity uses several types of learning strategies, such as **Background Readings**, **Handouts**, and **Worksheets**. A Worksheet may lead to a pen-and-pencil exercise or possibly a role play or group discussion, and sometimes to an audiotape or a videotape. At the end is a **Summary**: it reviews critical learnings and asks you to specify how you plan to use those learnings back in the workplace and to identify additional skill development that you may need.

#### **Step 4. Application**

Once you have completed all of your selected skill-building activities in your Job Performance Situation, you will reassemble in your original Job Performance Situation group with other members who have taken part in related skill-building activities. (Note: participants who are working alone need to complete all skill-building activities within the Job Performance Situation to be successful in completing the Application Activity.)

#### ***X. Application Activity***

Pooling your knowledge gained from participation in several skill-building activities, you and other participants apply what you have learned to address the challenges presented in the case. Included in section X is a Post-Assessment. By completing the Post-Assessment and comparing the results to the initial Self-Assessments for the skills linked to this Job Performance Situation, you will get an idea of the skill development you still need to pursue.

#### **Step 5. Planning for Workplace Follow-up and Support**

Completing the *Moving Ahead* materials is only an initial step in your skill development or enhancement process. The next step that of transferring what you have learned from the curriculum's hypothetical Job Performance Situations to the actual job performance situations you encounter in your workplace will require thought and planning.

The Learning Plan that you began along with your initial Self-Assessment provides you with space for tracking those *Moving Ahead* activities that you've completed, and for recording next steps that you will take to continue your skill development. These next steps can include repeating selected *Moving Ahead* activities with colleagues, reading more about the topics, and seeking opportunities to practice the skills in a work situation.

The Learning Plan also provides a place to record the types of support you need from your supervisor, co-workers, or others in the workplace. Ways in which others can help you succeed can include monitoring your progress and providing constructive feedback; serving as your mentor or coach for a specific skill; or providing you with opportunities to practice the skill in a structured on-the-job training situation.



## V. Notes for Facilitators: Roles and Responsibilities

If you are a facilitator for *Moving Ahead*, you may be thinking, “If this is a self-directed design, why do you need facilitators?” Good question.

If participants are working on their own or in pairs or small groups, they will not necessarily need a facilitator; or else they will only need a facilitator to act as a backup resource if they are stuck or unsure how to proceed. Facilitators are important, however, when the training is held as a group event. In the pilot tests, we found that participants needed some support and guidance as they worked their way through the materials and the sequence of learning activities. When training is conducted as an event, or a series of events, with numbers of staff working on the materials at the same time, facilitators can:

- ensure that participants understand the training process by answering questions about *Key to the Toolbox* or the training materials; answers to several commonly asked questions are included at the end of this section
- help ensure that participants have all they need to complete the activities
- provide guidance in the event that participants get stuck in any part of the learning process
- facilitate small group discussions

A facilitator may be an outside person skilled in working with groups, brought in for the training; a supervisor who takes on the role of facilitator; or even one of the participants who volunteers to help move the training process along. What does a facilitator do? What does he or she need to know?

### OVERALL RESPONSIBILITIES

If you are a facilitator at a group training event, your major role will be that of a “guide on the side.” You will not have to conduct any lectures or presentations, for example, since participants will receive information on the subject area from the background readings. You will be available, though, to answer any questions or concerns participants may have about the Background Readings, and to provide assistance if they encounter something they do not understand or are having difficulty moving on.

Your overall responsibility is to (1) help ease participants’ potential discomfort with the self-directed design and (2) keep the process moving along so that participants have an opportunity to experience and respond to the full training experience. Your presence can help ensure that participants:

- have all the materials they need at the appropriate times during the training
- are properly introduced to the various components of the process
- make transitions from one activity to another and move efficiently into their small groups
- clearly understand the directions for all activities and exercises
- have the materials (written, audio, visual) they need for their activities
- complete all individual and group tasks before moving on to the next activity
- remain engaged in small group activities
- understand and respect the different learning styles and tempos of all within their small groups
- lead group discussions when appropriate: see activity 1–D, Leading a Guided

Discussion, and 3–C, Fundamentals of Leading Meetings, for suggestions.

The more comfortable participants become with the process, the less support they need. For example, members of a small activity group may want to select their own timekeeper, or the group as a whole may take on responsibility for ensuring that everyone has completed a task before moving on to the next. When you notice that participants are taking charge on their own, you can ease away from the facilitation tasks. Use your judgment to decide when and how much to ease back and let participants share in the facilitation.

## **STEP-BY-STEP RESPONSIBILITIES**

### **Step 1. Pre-Training Planning for Participants**

As a facilitator, you may be the one who introduces the participants to the CBT model and the process. You should thoroughly familiarize yourself with the information, which describes the training process and the contents of the toolbox. If you wish, use transparencies made from the pages in the Appendix to introduce the training to a group of participants, whether they will train together as a group or work in pairs or small groups or individually. You can also provide copies of *Key to the Toolbox* to all participants.

### **Step 2. Setting the Context for Competency Development**

If you are working onsite with a large group of participants, your responsibilities are to:

- clarify if participants will choose activities from all six Job Performance Situations or will concentrate on only one or two
- distribute copies of cases and Self-Assessments, section A, for all Job Performance Situations that participants will be addressing; instruct participants to read the Job Performance Situation cases and complete the Self-Assessment for each
- instruct participants to read the directions for completing the first column of the Learning Plan, and respond to any questions they may have After this work is completed your next task will be to
- distribute the Case Activity, section B, to the members of your group
- introduce the activity by reviewing with participants the Reference page and overview for the Case Activity, particularly the time frames for completing the activity
- ensure that participants are clear on the directions for the activity and respond to any questions or concerns
- instruct participants to begin the activity by reading the Handout and completing the case questions individually; then facilitate a discussion about the case among the participants, using the questions as a point of departure
- record salient points from the discussion on newsprint (you may also ask for a volunteer from the group to record)

### **Step 3. Skill Development**

As participants break into small groups of various sizes to engage in skillbuilding activities, you can facilitate one of these small groups by:

- introducing the skill-building activity by reviewing with participants the Reference page and Overview for their selected skill modules (make special note of any additional

materials required for the activity, the time frames for each component, and the total time allotted for completion of the full activity)

- asking for, and responding to, any questions or concerns participants may have before and during their participation in the skill-building activities
- ensuring that all required equipment and materials are available to participants when needed
- making needed interventions during group discussions to ensure that all members have an opportunity to participate, that participants stay focused on the learning activity, and that critical learnings are documented
- facilitating discussions as needed
- ensuring that all participants complete the Summary Activity at the conclusion of each skill-building session

#### **Step 4. Application Activity**

All participants who have participated in skill-building activities related to a particular Job Performance Situation will come together as a group to complete the Application Activity (X) for that specific Job Performance Situation. As a facilitator of an Application Activity group you will:

- distribute the Application Activity X materials to the members of your group
- introduce the activity by reviewing the Reference page and the Overview, particularly the time frames for each component of the activity and the total time allotted
- ask for, and respond to, any questions or concerns participants may have before or during the activity
- make needed interventions during the group discussions and exercises to ensure that participants stay focused on the activity and make the transition smoothly from one component of the Application Activity to the next; also ensure that critical learnings are documented
- facilitate discussions as needed
- encourage participants to complete the Post-Assessment to document their learning

#### **Step 5. Planning For Workplace Follow-Up And Support**

This step of the training process helps participants make the transition to their workplace by:

- reviewing the results of their Post-Assessment, then revisiting their Learning Plans and planning for continued development and use of skills in the workplace

### **FREQUENTLY ASKED QUESTIONS**

As a facilitator, you may be asked questions about the training package. We have included several commonly asked questions here.

#### **Q: Do I have to take part in the Case Activity (B) before I do the skill building?**

A: It is strongly advised. Each skill activity, while it has generic aspects that can be applied to other Job Performance Situations you may face, was developed to address the situation presented in that particular Job Performance Situation, as illustrated in the case. If participants go directly to skill development without passing through the Job

Performance Situation first, they will miss the important context that will explain why certain features are included in skill-building activities and why others are not.

**Q. How do I calculate the time I'll need?**

A: One advantage of competency-based training is that it allows learners to move through training activities at their own pace. To guide participants in planning their time (and especially if the training is held in workshops, where it is important that cohorts of individual learners move through activities somewhat in sync), suggested times are listed for all the toolbox materials.

**Q. What if I want to do one skill from one Job Performance Situation but don't want to do the others?**

A. The training package was designed to lead participants from the Case Activity (B) through the related skill-building activities (C, D, E, F, and G), and finally into the Application Activity (X), where they have the opportunity to apply the skills they have explored to the Job Performance Situation case. Therefore, we highly recommend that participants complete more than one skill in a Job Performance Situation package.

**Q: Do I need to have my own activity material to complete a training activity?**

A: The competency-based approach emphasizes the participants' role in their own learning. The *Moving Ahead* materials invite participants to highlight Background Readings, take notes on new concepts, and complete Worksheets contained in the activities. This engagement with the materials promotes active learning during the training session itself and provides each participant with a record of her learning to refer to as she implements new skills in the workplace.

**VI. Appendix: Promoting *Moving Ahead***

- Head Start Competency-Based Training Program
- Key Components of *Moving Ahead*
- *Moving Ahead* Participants
- Three-Pronged Approach
- Competency-Based Learning
- Self-Directed Learning
- Active Learning
- The *Moving Ahead* Toolbox
- Flow Chart of the Training Process
- Materials Use Chart