EDUCATOR TRAINER ASSESSMENT TOOL

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Introduction

The Educator Trainer Assessment Tool was originally developed for use at the Northwest Institute for Community Health Educators, a skill-based residential training event for sexuality and HIV educators. Its focus is the assessment of trainers (those who provide continuing education to professional sexuality educators), but most of the skills, behaviors and philosophies expressed or implied would apply to sexuality educators (those who provide direct classroom or community education) as well. For example, the desired behavior "provides an emotionally safe learning environment for every learner" (# 1 in the Ethics section) is an appropriate assessment criterion whether the learners are a group of sexuality educators or a classroom of ninth graders. On the other hand, "Encourages the group to analyze his/her choice of teaching methods" (# 11 in the Methodology section) is probably less applicable to the evaluation or assessment of a classroom teacher.

This tool was developed to be used during an observation of an actual training or education session. However, it could also be used as a list of criteria for self assessment and improvement, for interviewing and hiring new community or classroom sexuality educators, or for writing job descriptions and evaluating staff. Please see our suggestions on page two for using the Educator Trainer Assessment Tool.

The first four sections of the tool -- setting the stage, methodology, delivery and content -- are presented as a somewhat chronological approach to a training session. We have also included a section for co-trainers and team teachers and sections on philosophy, attitude and ethics. Don't be overwhelmed with the number of criteria; we have tried to cover all aspects of sexuality education and training, but realize that each trainer will find only a few criteria from each section relevant. Also, each criterion is a goal; no educator meets all criteria all the time, and each on can be approached with a different style.

Overall, this Educator Trainer Assessment Tool espouses an approach to sexuality training and education which is democratic and pluralistic. We believe that, to be effective, sexuality training and education must ...

- provide a positive, comprehensive and honest perspective of human sexuality;
- respect cultural pluralism and promote universal values;
- respect and empower students;
- utilize a variety of teaching methods to address the diversity of learning styles among learners;
- address all three learning domains: cognitive, affective and behavioral;
- be taught by willing, comfortable and well-trained teachers; and
- promote life-long learning about sexuality.*

* This list is adapted from *Teaching About Sexuality*, Joan Helmich and Evonne Hedgepeth, New York University Press, 1995.

Suggestions for Using
the Educator Trainer Assessment Tool

The Educator Trainer Assessment Tool (ETAT) can be used in a variety of ways with several levels of formality:

- *Brief Self-Assessment:* To use the ETAT as a self assessment, read over the criteria, note those items that describe your strengths and those that indicate needed improvement. You might want to make an action plan for receiving feedback and increasing your skills.

- *Observing Mentors:* The ETAT can be used by new or experienced educators and trainers to analyze the skills of admired experts. Choose a few criteria prior to observing this person and analyze his/her behaviors. Or, review the criteria after observing the expert and analyze those that made the training or education effective.

- *Formal Self-Assessment:* A more extensive self assessment could include the following steps:

  1. videotape yourself doing a teaching or training session;
  2. review the criteria and select those you wish to assess;
  3. view the video tape with those criteria in mind; you may want to rate yourself on each criterion and write notes about ways you could improve;
  4. videotape yourself again (and on a regular basis) to assess changes in style, technique and skill.

- *Hiring New Educators/Trainers:* To use the tool for hiring new staff, you may want to review the criteria and choose those that reflect important factors you wish to assess, have applicants do mock presentations, and rate or rank them on each of the chosen criteria. Or you could more simply discuss important criteria in an interview, asking them to rate themselves.

- *Staff Evaluation:* Part or all of the ETAT can be used to evaluate staff. The staff to be evaluated could do either a brief or a formal self assessment (above) and then discuss it with his/her supervisor. Or a the supervisor could do a formal observation and assessment (see below) of the staff member's actual performance in a training or education session.

- *Formal Assessment:* During a more formal assessment, the trainer chooses criteria on which he or she wishes feedback and discusses those criteria with one or more observers. S/he is then observed (and possibly videotaped) performing an actual training or education session. Then the educator or trainer and observers discuss their observations and possibly review and analyze the video of the session. This is the process used at NICHE; more complete instructions for formal assessment follow.

Formal Assessment:
Instructions For Trainers To Be Observed

Before An Observation

Choose one or more observers. If you have a co-trainer, each of you may choose one observer; then the four of you can debrief together. Look through the criteria for assessing your skills as a trainer. Circle the numbers of two or three behaviors about which you would particularly appreciate feedback. You may circle the same numbers for each observer or different ones for different observers. Then give each observer a copy.

After Being Observed

Debrief as soon as possible after the session. This format seems to work well:

A. You, as the trainer-being-observed, begin by giving yourself feedback. Using the criteria as a guide,

   1. Describe what you liked best about what you did, what you're the most proud of.
   2. Describe what you would do differently if you had it to do again or what you will do differently next time.
   3. Let your observer(s) know if there are specific criteria with which you are already struggling and about which you'd prefer not to hear feedback or get advice at this time.

B. Co-trainers give one another feedback.

C. Invite your observers to give their feedback. Try accepting complimentary feedback without having to make self-deprecating retorts. And try hearing critical input for what it is: your colleagues' feelings and ideas, from their own cultural and personal perspectives, about how you might do an even better job.

D. Gather the written feedback from your observers for future reference.

E. Do whatever closure you would like. That may include reiterating what you are most proud of having done, or describing the one thing you heard that you most want to work on, or simply acknowledging that you will think about the feedback without making any commitments.

Formal Assessment:
Instructions For Observers

During The Observation

Jot down feedback that is behavioral and specific. Note factors with which you are impressed and phrases you want permission to "borrow," as well as behaviors you think might be improved. Remember that the process is for your own learning just as much as it is for that of the person you're observing.

Giving Feedback

Using the criteria as a guide,
1. Be descriptive rather than evaluative. Describe your own perceptions _ what you saw, heard and/or felt.
2. Be specific rather than general. Describe specific observable behaviors, including non-verbal body language, mannerisms, use of language (quote the person), tone of voice.
3. Consider the needs of the trainer receiving your feedback, paying attention to his/her ability to hear and use what you say. In other words, a few crucial comments may go a long way; don't feel you need to say everything you noticed.
4. Direct feedback only toward factors that s/he could change, those over which s/he has control.
5. Check the accuracy of your perceptions with other observers, if you are debriefing as a group.
6. Compliment the trainer with the same specificity and ownership with which you critique.

Criteria for Excellence
in Training Sexuality Educators

Setting The Stage
The Educator/Trainer...

1. Assesses group and individual needs verbally (actively listening) and/or in writing.
2. Establishes credibility with the group.
3. Describes his or her intentions or objectives for a particular session, relating them to the group's perceived needs.
4. Outlines agenda for the session (verbally or in writing).
5. Establishes ground rules and/or reiterates them as needed, modeling and promoting protection of confidentiality, demonstrating consideration for others' feelings, and acknowledging occasions when he/she may have unintentionally broken a ground rule or offended someone.
6. Acknowledges in advance possible feelings or differences of opinion that a session may generate.
7. Arranges the physical environment in a way that meets the needs of the audience.

Methodology
The Educator/Trainer...

1. Uses teaching methods appropriate to the objectives of the session.
2. Uses a variety of methods to address the needs of visual, auditory and kinesthetic learners (e.g., props, colors, music, storytelling, movement.)
3. Uses lecture only when an increase in knowledge is the primary purpose of a segment and, even then, judiciously.
4. Uses interactive methods.
5. Uses audio-visual equipment skillfully and judiciously.
6. Uses the resources of the group, allowing and encouraging them the opportunity to influence.
7. Enriches his/her teaching by judiciously drawing appropriate relevant examples from personal experience (as a parent, teacher, consumer, nurse, therapist, partner, adoptee, administrator, diabetic, etc.).
8. Adapts pre-packaged curricula to his/her own teaching style and the needs of a particular group of learners.
9. Incorporates new knowledge and evolving perspectives into one's interpretation of a curriculum.
10. Encourages the group to analyze his/her word choices.
11. Encourages the group to analyze his/her choice of teaching methods (e.g., "I choose to use my fingers instead of a cucumber for that condom demonstration. Does anyone care to comment on that?").

Delivery
The Educator/Trainer...

1. Is clear and unambiguous when explaining complex ideas.
2. Is concise, repeating him/herself only when audience cues indicate a need; avoids tangents.
3. Is straightforward and matter-of-fact when necessary.
4. Is serious, empathetic and even sobering, when appropriate.
5. Smiles and uses enhancing and tasteful humor when appropriate, but never at anyone's expense.
6. States instructions slowly, clearly and one at a time.
7. Demonstrates verbal skills, speaking loudly enough, with varied tones and without verbal tics ("um," "uh").
8. Moves around, uses hands and otherwise provides visual variety.
9. Maintains a balance of control and spontaneity.
10. Makes appropriate interventions and/or revises plans as necessary (e.g., asking for feedback, suggesting an unscheduled stretch).
11. Begins and ends on time.
12. Paces the session comfortably and avoids communicating his/her own anxiety about the time.
13. Presents in an organized, logical fashion, making the organization and logic clear to the group.
14. Refers to previous relevant messages and to issues that will be addressed in greater detail later.
15. Provides rational transitions between parts of the session and meaningful closure at the end.
16. Demonstrates reasonable comfort with the subject and with his/her role as educator or trainer.
17. Communicates the expectation that learners are capable of performing a new skill.
18. Provides useful feedback to learners.

Content
The Educator/Trainer...

1. Provides complete, accurate information.
2. Makes handouts organized, readable, useful, relevant and reproducible.
3. Makes visuals (transparencies, flip charts) organized, readable, and visually appealing.
4. Provides content appropriate for the particular audience.
5. Defines new, vague, or technical terminology and avoids acronyms and jargon.
6. Identifies slang as such (without judgement, except when a term is derogatory) and translates to standard or medical terminology.
7. Distinguishes between crucial points to remember and background information, emphasizing and prioritizing key concepts.

Teamwork
The Educator/Trainer...

1. Gives useful, concrete feedback (both complimentary and critically constructive) to learners and co-trainer(s).
2. Gives feedback respectfully, in a timely way, and in private (or as previously negotiated).
3. Asks for and handles feedback from others graciously and uses it constructively.
4. Asks for colleagues' assistance when faced with a question or situation he/she isn't prepared to handle.
5. Offers appropriate assistance and input during co-trainers' pieces (respectfully, on task, cognizant of time constraints, and without interfering with learners' opportunities to contribute).
6. Negotiates with co-trainer(s) in a respectful way about whether or how to rearrange the schedule.
7. Problem-solves with co-trainer(s) as needed regarding group process.
8. Shares in team responsibilities prior to and during training.

Philosophy & Attitude
The Educator/Trainer...

1. Communicates respect for and enjoyment of children and adolescents.
2. Communicates respect for and enjoyment of adult learners.
3. Encourages positive working relationships and open communication among teachers, family, religious leaders, health care providers and school administrators.
4. Communicates respect, through language and tone, for diverse individuals and avoids generalizations about them (people of both genders and of various ages, races, ethnicities, family constellations, religious and political persuasions, sexual orientations, socio-economic classes and physical and mental abilities ... e.g. avoiding anti-religious or anti-conservative comments).
5. Uses examples from groups (in "4") so that no learner is consistently rendered invisible by omission.
6. Makes very clear that he /she is not making assumptions about learners' sexual history or their current behavior, values, orientations, etc., and, in fact, welcomes the probable presence of diversity within the group.
7. Speaks for him/herself, from his/her own life experience (not for all members of an identity group, e.g., women, Catholics, Whites, people with disabilities, etc.) and never expects others to represent a whole group either.
8. Dresses in a professional, credible and appropriate manner.
9. Communicates genuine support for abstinence from oral, anal and vaginal intercourse.
10. Communicates genuine support for informed choice in all health behavior and health care decisions.
11. Communicates reverence for and appreciation of the human body and its capacities.
12. Communicates reasoned confidence in the efficacy of sexuality education, without defensiveness.
13. Takes obvious pleasure in teaching and facilitating.

Ethics
The Educator/Trainer...

1. Provides an emotionally safe learning environment for every learner.
2. Ensures that learners are exposed to a broad range of beliefs, in a fair and respectful way.
3. Accurately represents his/her capabilities, education, training, and experience (and the limits thereof), apologizing for mistakes and faux pas, and modeling that it is OK to say "I don't know."
4. Expresses research findings honestly and without distortion.
5. Makes every effort to acknowledge the author/originator of activities, songs, materials, and studies.
6. Opposes the use of deception, intimidation, fear, shame, guilt or censorship in the name of "education."
7. Addresses controversial issues but distinguishes unambiguously among personal opinions and values, agency/district opinions and values, and those that are generally accepted as universal.
8. Attempts to recognize and acknowledge his/her own cultural assumptions.
9. Acknowledges and follows pertinent sexuality education laws and policies.