



FROM THE DESK OF  
KEOLA AIPRIANA

3/8/79  
3:30

Marlene -

No answer at your office so  
I had Tommy drop this off to you.  
Page says Altho positions were re-  
funded, to go ahead anyway and  
include this in tonite's BOD meeting.  
Mahalo!

Keola

#### Position Description

Position: EXECUTIVE DIRECTOR  
Responsible to: President, Polynesian Voyaging Society

#### Responsibilities:

1. Have overall administrative responsibilities of organization.
2. Provide guidelines, procedures for operations of program/committees.
3. Provide evaluation and other reports on administration and programs, as necessary.
4. Provide support to staff and committees for implementation and maintenance of activities.
5. Implement Board of Directors' policies.
6. Provide training to staff, Board of Directors, committees and select community groups and leaders, as necessary.
7. Recommend hiring of staff to Board of Directors.
8. Establish rapport with agencies, groups and individuals as representative of the Board of Directors.
9. Represent Board of Directors at public functions as requested.
10. Provide coordination of data-collecting, assessment and dissemination.

#### Minimum Requirements:

- M.A. or equivalent in education and experience in business administration.
- Driver's license.
- Knowledge of federal and state programs.

#### Experience:

- Program management, organizational development.
- Budget management.
- Training.

# TRAINING PLAN

	<u>March/April/May</u>	<u>June/July/August</u>	<u>September/October/November</u>
Planning	Basic MBO	Systems Design	Refine/Evaluate
Public Relations	Basic Proposal Development	Funding Sources	↓
Education	Basic Writing Techniques	Public Presence	↓
Culture	Program Development	Program Implementation and Maintenance	
	Coordination of Internal and External Resources		
Research	Data Collection/Assessment		
	Evaluation Techniques		
	Recommendations	Remedial Techniques	Evaluation Reporting

INSTRUCTIONS FOR ASSISTING SPONSORS  
IN PREPARATION OF GRANT PROPOSALS

The foregoing seeks to improve the understanding between potential sponsors and ALU LIKE staff members with regards to guidelines as imposed by DINAP. By this means, it is hoped that you will be able to assist sponsors understand their true missions in the course of training participants for permanent placements. Experience has shown that the true purpose of this program in many instances has been overlooked and replaced with the "getting people jobs in my area" philosophy. This is understandable but cannot continue under that premise alone. It is essential that we deal with our sponsors factually and give them the right perspective about the E&T program.

Basically, if you stay with the guidelines as illustrated in the manual, you should have little trouble conveying to the sponsors the various stages of their plans and the necessary compliance to DINAP's goals and objectives.

Explain that ALU LIKE will only monitor and evaluate the project as has been outlined by the sponsor. Of course, our criteria for evaluating will be of a broader nature and will seek to determine compliance and fidelity to the proposal in all its components as the means of determining its continuance and possible refunding.



Page 2

You should expect many community project-type proposals to be submitted as has been the case in FY78. However, your new sponsor manual should minimize the difficulties you once experienced due to the extensive variables the FY78 criteria allowed. This is not to say necessarily that those guidelines were in violation or in non-compliance to DINAP's goal but rather that the scope was too broad.

In preparation for receiving requests you must be thoroughly familiar with the overall goals and objectives of ALU LIKE and DINAP and be able to explain them in detail if necessary. In addition, your complete understanding of the Planning Model as well as the Evaluation and Monitorial Model is absolutely essential in qualifying yourself to meet the sponsors and assist them not only in the planning of their proposals but also with the operational aspects. It will make your job easier in the long run.

Most assuredly, there are going to be instances where the proposal will be nothing more than a veiled attempt to create jobs. Some of these may be in job-depressed areas and you may be hard pressed to make a recommendation favorable to the applicant if this occurs. Just remember the bottom line: "Will the training provide career-oriented permanent placements for participants in an unsubsidized organization?" If not immediately, can this prospect be anticipated within a reasonable time frame?

Page 3

Your skill in grantsmanship may have to be applied if you earnestly feel the justification for such a project to fly. The guidelines, while appearing to be prohibitive, are broad enough if you use your keen sense of interpretation. Help the sponsor to "see" that he/she can comply by revising or modifying the plan. Don't let the proposal go any further up the line unless you are in full agreement. This makes it easier for IMAC to consider favorable approval when they see that your recommendations are positive.

Should the case be of a borderline variety, include in your recommendations strong explanation of the "weak" area of the proposal. Go over each step of the plan and make sure the sponsor has indicated how he/she intends to meet the various stages of participant development.

For your information, here are a couple of many possible reasons which could be considered causes for grant denial:

- a. Project does not contribute to an ALU LIKE program area.
- b. Our assessment indicates project as described does not contribute to the attainment of E&T goals and objectives.

In studying the guidelines, perhaps you may feel that the language and terms used may tend to scare away some potential sponsors whose educational backgrounds does not prepare them to comprehend, much less use such language and terms. If this is the case, take the time to use appropriate language and terms to illustrate or explain program language

Page 4

but don't depart from constantly referring to them as all sponsors must accept such terms and the use of them because it is the language of federal funding.

It is mandatory that you direct the sponsor through the guidelines in such a manner that there will be absolutely no misunderstanding on his/her part on any phase or component of the guidelines in order that there be no repercussions at some later date.

Bear in mind that proper management of the project is paramount to the success of it and ultimately should prepare the participant for the planned results. Reinforce this aspect as you lead the sponsor(s) through the guidelines and save yourself from unnecessary repetition through the life of the project.

Once you have accomplished this, the major emphasis should be in the areas of monitoring and evaluating. These are the indicators of the degree of progress in any project.

Monitoring should indicate the activity schedule with target dates. In other words, the monitoring reports would reveal the extent to which the project operation conforms to the work plan according to schedule on a timely basis.

This should be relatively easy to follow as the Methods and Tasks components of the guidelines will indicate, by time schedule, the rate of progress anticipated for the participant. ALU LIKE's on-site 30-60-90 day etc., monitoring basis should keep us abreast of the progress of the projects as well as of our participants.

Page 5

Prior to returning to their respective Island Centers with their reports, ALU LIKE monitors will discuss their findings with project leader(s) and recommend any revisions or modifications seen as being necessary to assist in improving the activity.

Evaluating is simply measuring results against a predetermined objective(s). In this process, ALU LIKE people would be primarily interested in the measure of attainment of the specific objective(s). Whatever the objective(s), it can be measured on a percentage-attained basis, at the time of the first evaluation and those subsequent. (Evaluations are to be made two or three months prior to the proposed termination of the project and every month thereafter until the project runs out its term.) At this point, you would have a good idea of whether or not the project has attained the level of achievement as proposed and also how effectively the management (leader) has done its job.

The product (project) evaluation checklist and related narrative and rating criteria is found in the "Instructions for Evaluation" booklet.

Page 6

"A program evaluation must proceed as an effort by the individuals running the program to improve program performance ---all program analyses are aimed at supporting this goal."

With this statement in mind, your objective should be clear. Your observations and; hence, your efforts should be directed at assisting the program leaders achieving that goal.

Listed below are checks you will use as guidelines to review, monitor, and evaluate the product:

1. What is the projects contribution or value (worthiness)?
  2. What is its planning structure?
  3. Are the goals and objectives clear and relevant?
  4. Is the program strategy clear?
  5. Are the methods of achievement valid?
  6. Is there clarity of performance output and outcome?
  7. What about the technical performance?
  8. What about the staff effectiveness?
  9. Was the performance level in education and training significant?
  10. What about the execution of the financial plan?
  11. Is and was the overall managerial and financial program sound?
  12. What is the quality of the overall contract administration?
- 9

LIMITS ON PARTICIPATION ELIGIBILITY

The new law prescribes specific limits on the length of time a participant is eligible to be enrolled in programs under CETA as follows:

A. Section 121(c) (1) "All persons participating in training under this act shall receive allowances from funds under this act for institutional or classroom training for ~~no more than 40 weeks in any five-year period~~"

*Financial  
assistance*

B. Section 121(c) (2) "Subject to Section 212 (B), no individual shall participate in programs receiving financial assistance under this act for longer than a total of ~~thirty months in any five-year period~~. For purposes of this subparagraph, ~~no period of participation prior to October 1, 1978, shall be included in the computation of such thirty months.~~"

C. Section 121(I) "Except as provided in section 212(B), ~~work experience~~ programs conducted under this act ~~shall not exceed a total of 1,800 hours for any individual (other than an in-school youth), for any year, and not more than 2,000 hours within a 5-year period beginning October 1, 1978.~~"

*Work Exp*

D. Section 122(H) (2) "No participant may be paid wages from funds under this act for public service employment for more than ~~78 weeks in a 5-year period.~~"

*PSE*

*(1 1/2 years only)*

E. Section 122(H) (3) "For purposes of subparagraph (2), no more than 26 weeks of public service employment financed in whole or in part under this act prior to October 1, 1978, shall be considered as part of the 78 weeks."

F. Section 212(B) (2) "Work experience programs conducted under this part, except for in-school youth, shall be subject to the limitations on duration specified in section 121(C) (2), unless the prime sponsor's plan as approved by the secretary establishes that the lack of alternative job opportunities in the area makes such conditions and limitations impractical."

*Exceptions  
to this  
upon approval  
by Sec. due to  
lack of alternative  
job opportunities  
in area.*

## MONITORING--THE WHY AND HOW

Monitoring is the assessment of the process of delivering services to a client population and the identification of strengths and weaknesses of services provided by the sponsor (employer). Monitoring is a very important aspect of all programs but particularly in OJT operations. Regardless of how well a program may be developed and implemented, unless ALU LIKE receives periodic feedback on progress toward objectives, the program may not be successful. Problems should be dealt with as they arise so that immediate corrective action may be taken and plans made to prevent future occurrences.

A monitoring system must be well-planned and implemented, with an understanding of ~~who~~ who will monitor, ~~when~~ and ~~how~~ the monitoring will be conducted. The E&T Coordinator will have this responsibility as well as that of developing evaluation teams comprised of IPS and JD personnel. It will also be the responsibility of the E&T Coordinator to determine the level of acceptance or standards.

The sponsors will be notified by phone of the impending visit of the ALU LIKE monitoring team (IPS/JD) by the E&TC or designate. Caution should be exercised not to interrupt the trainees' work or the sponsors' schedule and don't take up any more of the sponsors' time than necessary. Nevertheless, the monitor(s) should personally visit the training site to interview the trainee and supervisor at least once a month. This interview should be brief. The trainee and supervisor should be interviewed

separately and questioned to determine the following things:

1. Is the employer satisfied with the trainee's work and progress?
2. Is the employer meeting the financial obligations to the trainee?
3. Does the employer or the trainee see any problems developing.
4. Is the employer in compliance with the assurances and certifications of the contract?
5. Is the trainee being trained in the agreed occupation, and is the training outline being followed?
6. Does the trainee feel that satisfactory progress is being made toward the career goal?
7. Does the trainee have a good feeling about the employer and the work situation?
8. Does the trainee know about available supportive services, and are they being furnished to him or her as needed?
9. Have supportive services had any effect on the trainee's attitude or adjustment to the job?
10. Is the employer keeping adequate records, and are reimbursements received promptly?
11. Is there any technical assistance that the Quality Control Monitor or some other person could provide which would be beneficial?

Both sponsor and trainee should have the telephone number of the monitor(s) and be encouraged to call without hesitation should a need or question arise. It is essential that all parties involved in the contract training process be honest and cooperative and that they communicate well with each other. Although what has been described as a monitoring function, it may be more useful to describe it as a service visit. A record of such service visits must be maintained by the monitors on such forms as



may be applicable with copies of each being submitted to the Management Information Secretary for custody.

The E&TC should rotate monitor(s) to preclude any tendency for the monitor(s) may see themselves as sales and service persons and not as ~~compliance officers~~. If the E&TC does not wish to rotate monitors, a quality control monitor could be designated to make formal visits on a random basis making inquiries to a greater depth than the normal monitor. At this level, the quality of the regular monitor and the quality of the service visits could also be checked. Make sure too many people are not calling on any one sponsor with such frequency as to engender suspicion and annoyance.

When the quality control monitor visits a sponsor, some very basic and easily overlooked matters should be checked.

ALU LIKE considers the following to be important concerns for a monitor to investigate:

- Does the trainee exist?
- Are adequate payroll records and personnel files being maintained which substantiate the employer invoices submitted for payment?
- Is there adequate documentation of supportive services for which the employer has claimed reimbursement?
- Are there good internal payroll controls so that the same individual does not keep time, issue, and distribute checks? Such a one-person system could invite fraud or payment abuses.
- Confirm the eligibility of all trainees prior to visiting the job sites and determine starting date(s). (Some employers may have been tempted to have regular employees certified as trainees.) Examining the time cards and payroll records will verify agreement between the names on your record list and that of the sponsor.

Since the length of training is usually determined by the skill level of the occupation, a monitor should make certain that the trainee is being trained in the agreed occupation and not at a lower skilled job.

Ascertain from payroll records that trainee is receiving the wages or salary agreed upon in the contract.

Reimbursement for providing supportive services is a provision that can be abused easily. This being a possibility, the monitor may ask a trainee if he or she has received the service for which the employer has invoiced. In order to verify the employer's claim, it is a good idea to request that the employer maintains receipts for any such services provided. For example, if transportation money is given to the trainee, it would be well for the employer to have a receipt signed by the trainee.

When trainees are terminated, a monitor should investigate the reason given by the trainee and whether or not it matches the reason given by the employer. Termination trends and the recurrence of the same reasons may suggest the need for corrective action and have implications for the desirability of future contracts with the employer.

Both the assigned monitor and the quality control monitor (or contract monitor) will [REDACTED] and [REDACTED]. These reports should be reviewed by the E&TC or a third party on the ALU LIKE island staff. [REDACTED]

A good monitoring system, thoughtfully designed and executed, may make the difference between success and failure in providing a quality program.

### SUPERVISOR QUESTIONNAIRE

1. How would you describe the working (training) relationship between the participant(s) and you?
2. How would you describe the attitude(s) of the participant(s) toward their assignments?
3. How do you motivate your participant(s) to come to this site daily? on time?
4. What work habits have you developed within the participant(s) that were absent at the outset of the program?
5. What kind of daily reports are you responsible for? Describe them.
6. What skills do you employ in handling problems involving participants when they arise in your area?
7. Who is your immediate superior?
8. Who does your immediate supervisor report to?
9. How would you describe communications coming to you from your superiors?
10. Describe your job and the tasks you must perform in training a participant(s).
11. Are you able to counsel participants who need guidance in the matters of finance? health? spiritual? mental?
12. How do you assess the component you supervise?

#### ADMINISTRATIVE QUESTIONNAIRE

1. Describe the resources you have and how you are utilizing them.
2. How are your resources structured?
3. What policies have you developed and implemented to help you attain your goal(s)?
4. Have you a plan to maintain adherence to your policies?
5. What means do you use to modify or revise policies if conditions change?
6. How do you develop a course of action for unanticipated situations?
7. How do you orient participants to your organization?
8. How do you influence positive group and individual goals?
9. How often do you meet with your subordinates?
10. How do you reinforce the need to meet the specific goals of you with your staff?
11. What medium of communications do you prefer to use with your staff?
12. Of the mediums used, which is the most effective?
13. What kind of reports are submitted to you? How often?
14. To whom do you submit reports? What kind? How often?

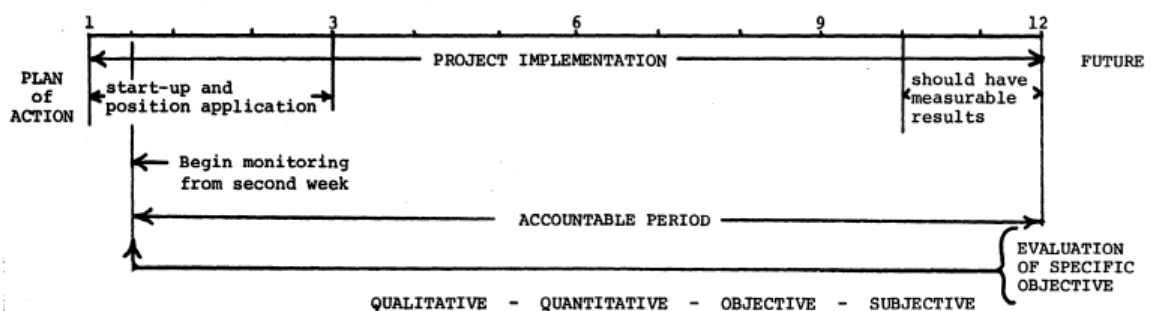
# EXHIBIT A

## RECOMMENDED PLANNING MODEL

WHAT IS THE PROBLEM OR THE NEED?	WHAT IS YOUR GOAL? HOW WILL YOU MEET OR HOW WILL YOU SOLVE THE PROBLEM?	WHAT IS THE SPECIFIC OBJECTIVE (OR CRITERIA)?	WHAT METHODS WILL YOU USE?	WHAT TASKS WILL BE PERFORMED?	WHAT IS YOUR BUDGET?	HOW WILL YOU MONITOR?	HOW WILL YOU EVALUATE?	FUTURE
"Native Hawaiians in order to achieve economic and social self-sufficiency, must feel free and be willing to learn in a multi-cultural society."	<p>A. Provide supportive evidence that the project fulfills the goals &amp; objectives as previously stated.</p> <p>B. Provide supportive evidence that the project will improve the present delivery system (ALU LINE) and/or other social service agencies.</p> <p>C. Provide supportive evidence that the project will give impetus to community development through educational awareness or economic development.</p> <p>D. Provide supportive evidence that the project training will include the dynamics of human relationships and job related skills.</p>	<p>A. The objective provides a clear indication of its mission or target.</p> <p>B. The objective refers to the client/organization and to his/its behavior/operation. i.e. Oceanic Institute is aquaculturally oriented.</p> <p>C. The objective describes an observable behavior or product.</p>	<p>A. Provide a favorable learning environment to facilitate development.</p> <p>1. attitudes &amp; motivational process</p> <p>2. qualified instructors or supervisors</p> <p>3. proper equipment and/or tools</p> <p>4. appropriate safety and/or protective devices</p>	<p>A. Provide good supervision (counseling &amp; guidance)</p> <p>1. mental</p> <p>2. physical</p> <p>3. spiritual</p> <p>4. financial</p> <p>B. Develop job skills; proper attitudes regarding keeping a job, being on time, working every day.</p>	<p>A. Estimate of your costs &amp; their justification</p> <p>B. Operating budget over life of term</p>	<p>A. Monthly? Quarterly? Semi-annually? Confine to methods and tasks</p> <p>1. qualitative? 2. quantitative? 3. objective? 4. subjective?</p>	<p>A. Measure attainment of specific objective(s)</p> <p>1. qualitative? 2. quantitative? 3. objective? 4. subjective?</p>	

## EXHIBIT B RECOMMENDED MONITORING & EVALUATION PLAN

THIS MODEL IS ONLY A SAMPLE USING A 12 MONTH TIME FRAME. YOU MAY HAVE A SHORTER TERM BUT PROPORTIONATE APPLICATIONS OF MONITORING AND EVALUATION WOULD APPLY.



### PROJECT EVALUATION CHECKPOINTS

- Progress and Results
- Worthiness/Appropriateness
- Potential for Economic Growth
- Self Sufficiency
- Cost/Cost Benefits
- Social Development Contribution (people)
- Community Contribution--Physical and Social
- Socio/Economic Development--Industry

March 2, 1979

TO: All Administrators  
FROM: Paige K. Barber  
RE: Training and Technical Assistance Plan - FY79

Please review this draft with members of your staff and make appropriate revisions no later than March 15, 1979. Assessments of community needs should be completed no later than March 30, 1979. Revisions by phone will be welcomed to facilitate activities.

While implementation of staff training has already commenced, for purposes of this effort, implementation date is set for March 20, 1979. Community workshops are scheduled for implementation no later than April 15, 1979.

Please be reminded that as of this writing, we have not received official release of T/TA national resources. As a result, while there is some time left for planning, we are scheduling implementation in anticipation that funds will be made available by then (March 20, 1979).

Mahalo for your cooperation.

—

8

**DRAFT**

**TECHNICAL AND TRAINING ASSISTANCE**

**PLANS FOR ALU LIKE, INC.**

**FY 79**



## TABLE OF CONTENTS

I. GOAL STATEMENT. . . . .	1
II. BACKGROUND. . . . .	2
III. PROBLEM STATEMENT . . . . .	3
IV. TRAINING OBJECTIVES . . . . .	4-5
V. TRAINING ROLES AND RESPONSIBILITIES . . . . .	6
VI. TARGET GROUPS . . . . .	7
VII. PROCEDURES. . . . .	8-9
VIII. MAJOR TRAINING TIMEFRAMES . . . . .	10
IX. EVALUATION. . . . .	11
X. BUDGET. . . . .	
XI. APPENDIX. . . . .	13
Bibliography. . . . .	14
Attachment I. . . . .	15
Attachment II . . . . .	16-17
Activity Worksheets . . . . .	18-23

## I. GOAL STATEMENT

"To design, implement, monitor and evaluate a training and technical assistance plan which will improve staff performance at all levels, refine management and program capabilities, and, over a period of two years, develop a team of trainers to respond to internal and external needs".

## II. BACKGROUND

Over the past three and a half years, Alu Like has grown from a staff of thirteen to nearly a hundred. In 1976, without benefit of T/TA allocations, the organization launched a state-wide needs assessment and Native Hawaiian registry. At the end of 1976, it would claim over \$50,000 in in-kind contributions and boast a listing of more than 1,000 volunteers. The soliciting of in-kind help continues to supplement federal and state appropriations today, as the organization moves to reduce its full reliance on government funds.

These efforts, of course, would not have been possible without the support of the Alu Like staff --- through their enthusiastic commitment to the goals of the organization, and their aloha for the Hawaiian people. Much of the support come from friends and relatives.

The Alu Like T/TA plan will attempt to refine this process so that the many hours of informal consultation we receive will become a part of the building of resources. In doing so, the larger scope of our ability to access resources becomes clearer and our capacity to extend our internal and external talents can be strengthened.

### III. PROBLEM STATEMENT

Except for the annual statewide staff orientation, staff T/TA usually suffers from:

- 1) delayed release of funding which affects the timely response to training and program needs
- 2) inadequate assessments due to lack of sufficient probing to clarify needs
- 3) inconsistent information and instruction
- 4) insufficient followup on training and technical assistance provided
- 5) limited training and technical assistance available internally and externally
- 6) lack of coordination for all T/TA
- 7) problems with national T/TA provider
- 8) lack of a comprehensive plan

In summary, the organization needs to clarify roles, responsibilities for training, determine target groups and establish a time-frame which will accommodate and integrate a variety of needs for training.

#### IV. TRAINING OBJECTIVES

The forming of objectives requires a number of basic components so that evaluations yield information which help the organization measure its outcomes accurately.

Since the island centers are a reflection of all of the separate components of central, and will someday take on its image through its emerging autonomy, how the island centers develop will be important. The FY79 T/TA plan proposes to nurture this process. However, to do so, there must be standards against which products or outcomes can be measured.

Standards need not be complicated. The Clerk-Typist/Receptionist Training Plan and the Reproduction/Supply Clerk Training Plan (see Attachment I) is an excellent example. By using these plans, the overall objective of training can be easily developed and measured because the plan maps out each skill area and level of performance; determines the amount of time the training will take and when training will be completed. Assessments thereafter should measure skill attainment levels and skill refinement needed (see Attachment II).

The degree of expected improvement should accompany objectives as well as the cost of training. For internal training, where monies are not used to purchase training skills, a budget would not be necessary. However, an accounting of staff time spent on training aids in determining feasibility.

The training objectives are broad and apply to each unit. The central units are expected to work on completing its standards with input (where feasible) with island centers using these objectives:

Training (internal/external resources used)

- (1) Improve staff performance and stabilize operations.
- (2) Improve management capabilities.
- (3) Establish accountability for training activities and performance outcomes.
- (4) Train staff to train others.

Technical Assistance (contractors)

- (1) Provide information and instruction to prepared the organization for long-, short-range goals and objectives.
- (2) Provide community workshops and technical assistance to groups.
- (3) Purchase technical assistance for special needs.

These objectives can be viewed in relationship to unit requirements; need inputs from staff, timeframe and estimated cost in the activity worksheet. Further, technical assistance requirements are integrated in the worksheet for full display of the organization's systems and its related parts.

## V. TRAINING ROLES, RESPONSIBILITIES

All T/TA will be coordinated at central with island center administrators having the responsibility for assessing needs, implementing activities, monitoring and feedback.

### Island Center Responsibilities:

- 1) complete staff and community needs assessment
- 2) recommend T/TA activities/resources
- 3) develop and maintain activity schedules
- 4) provide technical assistance to staff and community groups
- 5) handle all appropriate correspondence on the island level
- 6) assess activities and describe outcomes (evaluation)
- 7) process all T/TA information to central upon completion of each session

### Central Responsibilities:

- 1) verification and approval of all T/TA requests
- 2) processing of contracts and payments
- 3) developing and maintaining a resource bank
- 4) statewide monitoring and coordination
- 5) provide technical assistance to staff and community groups
- 6) evaluations - analysis and feedback of results

# VI. TARGET GROUPS

Responsibility	Target Group	Other
Executive Director	Unit Heads ICA's	Board HAC Advisory Committees
Unit Heads	Unit Staff ETC's Community	
ICA's	ETC's FR's ANA Clerks Community	IMAC Core Groups
ETC's	JD's IPS's YPS's MST's E&T Clerks Project Heads	IMAC



## VII. PROCEDURES

Following review and approval of the T/TA plan, to facilitate implementation, verbal approval to take action will be followed with written confirmation from the requestor. Written confirmation will accompany and will have the following information:

- (1) Unit or island center.
- (2) Name of requestor.
- (3) Date.
- (4) Need.
- (5) Objective.
- (6) Desired outcome.
- (7) Target groups.
- (8) Trainer.
  - contract (note: invoice)
  - resume
  - general excise tax license number} does not apply to staff  
trainers
- (9) Logistics.
  - date
  - time
  - place
- (10) Conference needs.
  - materials
  - supplies
  - space
  - equipment
- (11) Budget.

At the end of each session, a report must be submitted no later than 10 working days after completion. The report will include:

- (1) Evaluations.
- (2) Recommendations (include follow-up plans).
- (3) Roster of attendees.

(4) Receipts (if any).

(5) In-kind form (if applicable).

Please note that any agreements with contractors should include a statement on invoicing and that a memo to fiscal should be routed to avoid non-payment from occurring.

## VIII. MAJOR TRAINING TIMEFRAMES

First Quarter	Second Quarter	Third Quarter	Fourth Quarter	First/FY80
.Develop skills for new staff	.Conduct community workshops	.Continue workshops	Wrap-up workshops	
.Convene statewide training/orientation session	.Begin development of new skill-building	.Continue new skill development	Apply new skills	
.Begin refinement of maintenance skills	.Maintenance skill refinement completed	.Train new Board and HAC members	Complete evaluations	
.Begin search for new information/instruction to attain long-range goals	.Continue search for new information/instruction to attain long-range goals			
	.Begin purchasing new information and instruction	.Begin search for resources to launch pilot programs	Complete evaluations	
		.Write proposals		

#### IX. EVALUATION

All evaluations will be the responsibility of the unit heads, ICA's, ETC's and will measure outcome against objectives. Degrees of improvement, where appropriate, should be a part of this process.

Recommendations will include a plan of action and units/island centers will have responsibility for follow-through.

XI. APPENDIX

#### BIBLIOGRAPHY

Internal Evaluations - 1978

Oahu/Kauai Review, Mary Ann Pyun - 1978

ICA Input on Staff Training Needs - 12/1978

Staff Evaluation on Statewide Orientation - 1/1979

Wrap-Up Comments, ICA's/ETC's - 1/1979

ICA's/ETC's Input on Staff Needs - 2/1979

MBO Workplan FY79

ATTACHMENT I

CLERK/TYPIST TRAINING PLAN  
RECEPTIONIST TRAINING PLAN

I. Objective

To train clerical staff to maintain and improve operations by developing basic skills in operating office machines and organizing and processing all information pertinent to this unit.

II. Task Function List

Attachment I would serve as task function list. This list determines the activities necessary to maintain the unit's operations.

III. Evaluation

Evaluation determines whether the individual trained has:

- (1) been provided all training described in the plan.
- (2) received training as scheduled.
- (3) the ability to operate office machines.

Taking the evaluation one step further, the evaluation can also measure the level of proficiency of the trainee at the end of training and deal with recommendations.

REPRODUCTION/SUPPLY CLERK TRAINING PLAN

Attachment II

	F	M	A	M	J	J	A	S
1. <u>Learning the capabilities, use, maintenance of office machines:</u>								
a. Kodak Ektaprint 150 - Copier	x	x	x	x	x	x	x	x
b. Savin 770 - Copier	x	x						
c. Gestefax - Stencil Maker	x	x						
d. Gestetner - Duplicator	x	x	x	x	x			
e. Binding Equipment	x							
2. <u>Processing of reproduction work orders:</u>								
a. Interpreting and completing copy requests	x	x	x	x				
b. Maintenance of copier logs (daily and monthly)	x	x	x	x				
c. Delivery of finished work orders	x	x	x					
d. Maintenance of adequate stock of reproduction supplies	x	x	x	x	x	x		
3. <u>Contact with vendor/sales representatives</u>	x	x	x	x	x	x	x	x
4. <u>Supply control/inventory:</u>								
a. How to maintain adequate stock in storeroom	x	x	x	x	x	x		
b. Receiving and processing requisitions	x	x	x	x				
c. Completing purchase orders	x	x						
d. Purchasing supplies	x	x	x	x	x	x		
e. Disbursing supplies	x	x	x					
f. Obtaining price quotes from vendors		x	x	x	x	x	x	x
g. Regular inventory processes	x	x	x	x	x	x		
5. <u>Mailing:</u>								
a. Use of postage meter/scales/rates	x	x	x	x				
b. Maintain adequate postage level	x	x	x	x				
c. Air cargo	x	x	x	x				
6. <u>Typing/filing of documents, forms, correspondence:</u>					x	x	x	x
a. Creating, updating forms					x	x	x	x
b. Form control (numbering system)					x	x	x	x
7. <u>Use of 10-button phone system</u>					x	x	x	x
8. <u>General office work/processes</u>					x	x	x	x



NOT TO BE USED AS RECEIVED

CLERK-TYPING TRAINING PLAN  
RECEPTIONIST TRAINING PLAN

Attachment II

		F	M	A	M	J	J	A	S
1.	Use of 10-button phone system:	Phone							
a.	Phone courtesy (referrals)	X	X	X	X	X	X	X	X
b.	Taking messages	X	X	X	X	X	X	X	X
c.	Receiving/Placing long-distance calls	X	X	X	X	X	X	X	X
d.	Maintenance of system	X	X	X	X	X	X	X	X
2.	Greeting/Dealing with public:	Public							
a.	Greeting (and referral)	X	X	X	X	X	X	X	X
b.	Waiting room courtesies	X	X	X	X	X	X	X	X
3.	Typing/General Clerical:	Typing/Clerical							
a.	Resources - Secretarial Book, Dictionary	X	X	X	X	X	X	X	X
b.	Typing correspondence:								
1)	From draft	X	X	X	X	X	X	X	X
2)	From dictaphone	X	X	X	X	X	X	X	X
c.	Processing Correspondence								
1)	Securing signature, making copies, mailing (enclosures, attachment)	X	X	X	X	X	X	X	X
d.	Typing reports:								
1)	Manuscript, manual, technical	X	X	X	X	X	X	X	X
2)	Numerical reports (routing)	X	X	X	X	X	X	X	X
e.	Composing:								
1)	Memos (transmittal, confirmation, etc.)	X	X	X	X	X	X	X	X
2)	Forms, charts, diagrams, etc.	X	X	X	X	X	X	X	X
f.	Typing stencils	X	X	X	X	X	X	X	X
g.	Filing by subject, alphabetical, chronological, crossfiling	X	X	X	X	X	X	X	X
4.	Use of office machines:	Office Machines							
a.	Kodak Ektaprint 150 - Copier	X	X	X	X	X	X	X	X
b.	Savin 770 - Copier	X	X	X	X	X	X	X	X
c.	Gestetex - Stencil Maker	X	X	X	X	X	X	X	X
d.	Gestetner - Duplicator	X	X	X	X	X	X	X	X
e.	Binding Equipment	X	X	X	X	X	X	X	X
f.	Postage Meter	X	X	X	X	X	X	X	X
g.	Dictaphone	X	X	X	X	X	X	X	X
5.	Maintain Staff In-Out Log:	Record-Keeping							
6.	Maintain Conference Room schedule: (log, obtain approval for non-staff use, checkout/in overnight key)	X	X	X	X	X	X	X	X
7.	Organizing skills:	Organizing Skills							
a.	Obtaining information by phone	X	X	X	X	X	X	X	X
b.	Setting appointments, confirming	X	X	X	X	X	X	X	X
c.	Coordinating meetings (date, time, place)	X	X	X	X	X	X	X	X
d.	Travel preparation (air per diem, grounds)	X	X	X	X	X	X	X	X
1)	Purchase Order	X	X	X	X	X	X	X	X
2)	Direct/Travel Agency	X	X	X	X	X	X	X	X
3)	Itinerary	X	X	X	X	X	X	X	X
4)	Reconciliation of travel expenses	X	X	X	X	X	X	X	X
8.	Other:	Other							
a.	Parking Validation - 17 -	X	X	X	X	X	X	X	X
b.	Bulletin Board	X	X	X	X	X	X	X	X



2

Activity Worksheet

(cont) Communications

3. Develop interviewing and reporting techniques
4. Develop writing skills for brochures, articles, reporting, correspondence
5. Develop capabilities in operating media equipment
6. Develop capabilities in production of written and oral materials
7. Develop publicity strategies

1.4 RESEARCH AND ANALYSIS

1. Develop understanding of statistics, its uses
2. Develop capabilities in gathering data, interpreting, using
3. Develop understanding of reporting system

1.5 PLANNING

1. Develop skills in proposal development
2. Develop skill in MBO/work-plan development, control
3. Develop knowledge of resources
4. Develop skill in writing reports, business letters, memos

1.6 OPERATIONS AND MANAGEMENT

1. Improve internal processing

Resources				Timeframe												Target Group					Assignment																					
Internal	External	Executive	Advisory	D	J	F	M	A	M	J	J	A	B	O	N	D	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12		
	X	X		X													X	X	X	X																						
X		X		X													X	X	X	X	X																					
X	X	X																																								
X	X			X													X	X																								
X																	X	X																								
X	X			X													X	X	X	X																						
X	X																X	X	X	X																						
X	X			X													X	X																								
X				X													X	X	X	X																						
X	X																X	X	X	X																						
X	X			X													X	X	X	X																						
X				X													X	X	X	X																						
X				X													X	X	X	X																						

- 19 -

②

## Activity Worksheet

## (cont) OPERATIONS AND MANAGERIALS

1. of information and instruction
2. clarify roles, responsibilities
3. clarify organizational procedures
4. strengthen verbal and written communication skills
5. Strengthen team-building skills
6. Promote cultural awareness and practice
7. Develop awareness of national and local legislative procedures, activities
8. Develop skills in supervision, teaching, coordinating, delegating, planning, projecting, reporting, evaluating
9. Develop skills in controlling manpower, budgets, other resources
10. Refine skills in community organizing, advocacy, service delivery and linkages, change systems techniques

## \*1.7 EMPLOYMENT AND TRAINING

1. Improve understanding of Federal, State and County Laws, rules, regs, guidelines
2. Provide regular meetings for administrators

	Internal	Regional	Central	Other	TIME FRAME												TARGET GROUP					ASSIGNMENT																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																			
					D	J	F	M	A	M	J	J	A	S	O	N	D	C	O	C	A	E	C	S	C	OR	E	D	P	O	P	D	P	R	A	E	T																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				

DOCUMENTS CAPTURED AS RECEIVED

3

	Training	Self	Self	Other		Telephone					Target Group					Assignment						
						D	J	F	M	A	N	J	J	A	S	D	N	D	D	P	P	P
(cont)	EMPLOYMENT AND TRAINING																					
3.	Improve JD skills in:																					
	- salesmanship	x	x	x																		
	- job market trends and analysis	x	x	x																		
	- job searching	x	x	x																		
	- entrepreneurship	x	x	x																		
	- job matching	x	x	x																		
4.	Improve IPS skills in:																					
	- counseling, guidance	x	x	x																		
	- using testing systems, finding resources	x	x	x																		
	- developing interviewing techniques	x	x	x																		
	- developing curriculum	x	x	x																		
	- job placements	x	x	x																		
5.	Improve MST skills in:																					
1.8 CLERICAL SKILLS																						
1.	Improve clerical skills in:																					
	- filing systems	x	x	x																		
	- telephone etiquette	x	x	x																		
	- organizing and processing work	x	x	x																		
	- basic office management and control systems	x	x	x																		
1.9 OTHER																						
1.	Financial planning and management		x																			
- 21 -																						

⑤

Activity Worksheet

(cont)

2.1 EDUCATION

1. Developing and maintaining an understanding of local and national legislation and its ramifications
2. Developing and maintaining advisory groups
3. Developing and maintaining parent advocacy groups
4. Designing and implementing pilot projects
5. Securing and controlling resources, multiple funding

2.2 ECONOMIC DEVELOPMENT

1. Understanding national and local legislation, implications
2. Developing skills in resource developing, finding, controlling
3. Developing skills in land investments, uses, control
4. Developing skills in marketing, projections, management
5. Developing skills in co-sponsorship of projects
6. Developing knowledge in agriculture, aquaculture
7. Developing skills in management, finance

Resources				TIMEFRAME												TARGET GROUP					ASSIGNMENTS									
Technical	Human	Material	Other	D	J	F	M	A	M	J	J	A	S	O	N	D	0	1	2	3	4	5	6	7	8	9	10	11	12	
	X	X	X		X	X								(1)	X	X	X												X	
	X				X	X								(2)	X	X	X		X											
	X	X			X			X						(3)	X															
	X	X	X		X	X								(4)	X			X								X		X		
	X	X			X			X						(5)	X	X		X								X		X		
	X	X	X	X	X	X									X	X	X									X		X		
	X				X			X							X	X	X		X							X		X		
	X	X			X										(6)	X	X									X		X		
	X	X			X			X							(7)	X	X		X							X		X		
	X	X	X	X	X	X									(8)	X	X		X							X		X		
	X	X			X			X							(9)	X	X		X							X		X		

- 22 -

6

## Activity Worksheet

# Activity Worksheet

## Resources

### Timeframe

### Target Group

### Assignment

D J F M A M J J A S O N D

C<sub>0</sub> C<sub>1</sub> C<sub>2</sub> C<sub>3</sub> C<sub>4</sub>

C<sub>5</sub> C<sub>6</sub> C<sub>7</sub> C<sub>8</sub> C<sub>9</sub> C<sub>10</sub>

(cont)

## 2.3 NATIVE RIGHTS

- Develop understanding of CONCON amendments and its impact on Native Hawaiians  
-traditional and customary rights  
-education, culture, language  
-Office of Hawaiian affairs  
-Adverse Possession  
-Water and land rights
- Develop understanding of national legislation  
-Native Hawaiian Education Act  
-Reparations

X ——— X ———— (4)

X X X X

X

X ———— (4)

X X X X X

X

## 2.4 HEALTH/MENTAL HEALTH

- Develop understanding of local health/mental health needs/concerns
- Develop skill in collecting data to design projects
- Develop understanding in securing resources  
-Most in Need  
-National Institute of Mental Health

X ——— X ———— (4)

X X X X

X

X ——— X ———— (4)

X X X X

X

X ——— X ———— (4)

X X X X

X

## 2.5 BOARD ELECTIONS

- Develop understanding of elections, nominations process
- Design training for new board and HAC members

X ——— (4)

X X X

X

- 23 - X ——— (4)

X X X

X