

APO LEADS

launch | explore | achieve | discover | serve

“A Personal Odyssey of learning, leading and serving”

PRESENTER DEVELOPMENT GUIDE



*“Continuing the odyssey by serving
the fraternity as a presenter”*

WELCOME!

Welcome Brothers!

Did you know that APO also stands for A Personal Odyssey? That's what **APO LEADS** is all about, A Personal Odyssey of Leadership Development.

If you are reading this guide, you are already considering continuing your personal odyssey by becoming a Presenter for Alpha Phi Omega's National Leadership Development Program, **APO LEADS**. Thank you! As an **APO LEADS** Presenter you will be able to train actives to improve their individual leadership skills to be leaders in their chapters and in their lives. The LD program is changing, growing and heading in new directions. Alpha Phi Omega is known on campuses for its service programs. With time and your contribution, the fraternity will become equally known for its leadership programs.

APO LEADS is still a work in progress. As of this revision Serve has just been presented for the first time and is undergoing revisions based on that beta test. As the program grows, its administration and training will grow with it. Amazing accomplishments have been made already and continue to be made as the training program develops. This guide is intended to provide an understanding of those aspects of the program. Naturally, because the program as a whole is still being developed, changes from what is written here may occur. Please be flexible to those changes. The most current version of this guide can always be found at www.leadership.apo.org.

Thank you for taking the time to read this guide. It is here to help you on your journey through **APO LEADS** Presenter training and to decide your goals within the **APO LEADS** program. More importantly thank you for taking the time to be trained and your commitment to present the **APO LEADS** programs. The LD Committee intends to build one of the best collegiate leadership development programs in the nation and your help is needed. **APO LEADS** has already been an incredible success that has surpassed expectations. Become a part of the team that's making that happen!

THANK YOU!!

In Brotherhood,



Christina M. Rock
Presenter Development Coordinator

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APO LEADS PROGRAM DESCRIPTION



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“A Personal Odyssey of learning, leading and serving”

The **APO LEADS** program is the National Leadership Development Program of Alpha Phi Omega, National Service Fraternity. It consists of five courses each of which focus on skills that will help the participant be a successful leader and team member in Alpha Phi Omega and in life. At the completion of the series of courses the participant will have a set of transferable skills that are applicable to the work world and to other organizational leadership. The five components of the **APO LEADS** program are:

LAUNCH - launching your leadership development

This 3-hour introductory leadership session is the launching point in the personal odyssey of leadership development and is a prerequisite session for the other **APO LEADS** components. LAUNCH has participants examine:

- What is leadership?
- What is the difference between leadership and management skills?
- What are characteristics of a good leader?
- How to provide leadership through the Servant Leader
- Organizational support of leadership according to the Servant Chapter model
- Effective communication review
- Introduction to conflict resolution
- Dealing with change
- Goal setting using the SMARTER model

EXPLORE - exploring personal leadership strengths and potential

Presented as a full-day (seven hours including lunch) session, EXPLORE provides an opportunity to expand your personal odyssey in leadership development by increasing your understanding of individual leadership skills.

EXPLORE will cover:

- Leadership values and qualities
- The model of Situational Leadership and importance of the interaction between leader and follower
- A more in-depth view of Ethics, Morals and Values and its impact on leadership
- How to make good decisions
- How to effectively problem solve
- Conflict, factors leading to conflict, how to resolve conflict effectively and how to overcome roadblocks to conflict resolution

ACHIEVE - achieving success through teams

This 3-hour session focuses on the interaction of members in the chapter, the leader(s) and the factors that lead to team success. Utilizing a mixture of interactive exercises and discussion, ACHIEVE takes the participants through a learning process that energizes, empowers and recognizes the team. ACHIEVE centers skill development on the Team Achievements model (© Career Dimensions 1996) and celebrating success. This course includes:

- The importance of being a good follower
- Understanding the interaction of various members of a team
- Knowing the roles people may play in a team
- Respecting and utilizing the diversity of a team
- Utilizing effective skills for team achievements
- Celebrating individual and team success

DISCOVER - discovering personal strengths and success skills

As a leader you will find yourself utilizing personal success strategies. This 3-hour session focuses on strategies including time and stress management, assertive communication, and self-motivation techniques. The DISCOVER course will be an opportunity to look at yourself, your personal strengths and to develop a plan for continued personal and professional success.

- Personality Styles
- Assertiveness
- Time Management
- Stress Management
- Motivation

SERVE - serving the fraternity by using management skills in your chapter

SERVE will be a weekend experience giving participants an opportunity to learn strategies and skills needed to operate a chapter. Participants will network with others who are charged with the daily operational needs of the chapter. The strategies and skills presented in SERVE will help participants succeed in their odyssey.

- Techniques to maximize learning
- Framework for effective chapter management
- Manage meetings effectively
- Organize and manage projects efficiently
 - Delegate responsibly
 - Communicate effectively
 - Create a project plan in a small group

*Alpha Phi Omega members completing the **APO LEADS** program will be recognized for the dedication to their own leadership development and furthering the principles of the Fraternity.*

A
Personal
Odyyssey through
Launching your leadership development,
Exploring your personal leadership strengths and potentials,
Achieving success through teams,
Discovering personal strengths and success skills, and
Serving the fraternity by using management skills in your chapter

WHO CAN BE AN **APO LEADS** PRESENTER?

Anyone.

Anyone who is willing to work at developing oneself as a presenter, that is. For some that will be a very easy road; for others it will take lots of work entailing not only **APO LEADS** training but also finding opportunities inside and outside of the fraternity to practice skills. It would be wonderful if everyone who wanted to be a presenter had the presentation and facilitation skills to do so. Unfortunately, or perhaps fortunately, everyone has different strengths and weaknesses. Not everyone will be able to perform with the degree of excellence necessary to maintain the program at a level that will benefit the members of the fraternity. All anyone can do is try.

Experience offers some insight into who may be able to travel an easier road. For example, active members are strongly encouraged to wait until they are alumni members. Although an argument could be made for special case students going through training, it is geared primarily toward alumni. There are two reasons for this orientation. Alumni, especially those who have also volunteered for operational staff, will tend to have broader experience both in APO and in life from which to draw. In other words, all the examples they use during the presentation would not begin with "In my chapter...". The more experience a presenter has, the better chance they have of being able to make the information relevant to all members of an audience. The other reason is a little more practical. People who are trained as **APO LEADS** presenters need to be able to afford to travel in order to present the courses and to make copies of materials. Alumni usually have better resources than students.

Active members are encouraged to attend presentations of all the **APO LEADS** courses to help them develop their personal leadership skills and in preparation for becoming an **APO LEADS** presenter some time in the future. Remember anyone is welcome to attend the Basic Skills Training modules, although preference in terms of space will be given to those planning to go on to Content Training.

Previous experience with LD training in APO is also likely to make it easier for someone to become an **APO LEADS** presenter. Anyone who completed Leadership Staff Development training does not need to complete Basic Skills Training before moving on to Content Training for the specific courses. Of course any of the former Leadership Development Workshop staff members who wish to go through one or both of the Basic Skills Training modules are more than welcome to do so

Anyone with appropriate experience outside of APO can speak with the Presenter Development Coordinator to determine if they may move directly to Content Training. The experience must be in some way criteria-based. Decisions will be made on a case-by-case basis. However, with continually developing one's skills in mind, even people who are eligible for an exception should consider going through the Basic Skills modules to receive feedback on their skills.

So who can be an **APO LEADS** Presenter? Anyone. Since leaders are made not born, anyone could become a presenter if they are willing to work hard enough. Take a look at the rest of this guide to see if serving the fraternity in this way is something you want to work toward.

PRESENTER RESPONSIBILITIES

As an **APO LEADS** Presenter you are responsible for bringing a NATIONAL program to the students. Wearing the mantel of being a national presenter entails a certain prestige but more importantly several responsibilities. Here are some thoughts on what those responsibilities are.

Volunteer Status

All **APO LEADS** presenters are volunteers. As such they must be willing to abide by the Risk Management Policy of the fraternity and indicate that willingness by signing and mailing the Volunteer Registration form in the appendix. One issue intimately connected with risk management is perception. **APO LEADS** presenters are in reality no different than any other volunteer in the fraternity. However, as with the members of the National Board, in the eyes of the students there is a large difference. As presenters of a national program, **APO LEADS** presenters need to be particularly conscious of their behavior before and after their presentation while they are still around the students that formed their audience. **APO LEADS** presenters are teaching students how to be leaders, Servant Leaders. Servant Leaders should take advantage of the opportunity to not only tell the students what that is, but to show them as well. We must make every effort to “practice what we preach”. Professionalism is a part of the evaluation system on which Presenters are rated. Please refer to that section of this guide for a further description of professional behavior.

Separation of Roles

As many **APO LEADS** presenters are also on section or region staff (operational staff), a conscious effort must be made to separate the roles. This separation means that during the presentation of a course it would be inappropriate to promote individual interests such as specific conference bids or candidates for particular fraternity offices. However, it would be appropriate to encourage students to host and attend conferences as a general principle and to talk with candidates in order to make a well-informed decision as to what is best for the fraternity. Making informed decisions is a way to be a Servant Leader. A presenter should use caution in addressing specific chapter issues of which there is awareness because of an operational role. Students familiar with the presenter in that other role may even try to draw the presenter into addressing such issues by asking “What if...” types of questions. Presenters should respond to these types of situations first by trying to get the students to apply the information they are learning in the course. If that does not satisfy the issue, the presenter can make arrangements to discuss it further on a break or at the end of the course when it would be more appropriate to step into an operational role. Because it is the job of operational staff to promote the programs of the fraternity this limitation is not bi-directional. Staff should make an effort to encourage students to host and attend **APO LEADS** courses.

Many operational staff and presenters alike use business cards to provide their contact information to students. Presenters are encouraged to make business cards separate from their operational position cards. The **APO LEADS** logo can be used for this purpose. Different versions of the logo are available in the files area of the **APO LEADS** Presenters Yahoo group.

Appearance

Presenters should dress in business casual (e.g. khakis and a polo shirt; no jeans). **APO LEADS** Presenter shirts are available for purchase. Information on purchasing these shirts can be found in the files area of the **APO LEADS** Presenters Yahoo Group. The logo shirts are an option available to Presenters but are not a required “uniform”. Simply dressing in a professional manner is sufficient. Avoid wearing flamboyant jewelry especially in the Achieve where the physical nature of some of the activities may make such jewelry a danger to the Presenter and/or participants.

Continuing Education

Each presenter must present each course for which they are certified at least once a year. If the opportunity to present does not arise within a year, this requirement may be met by observing a presentation of that course. Presenters are encouraged to create their own opportunities to present. When it has been longer than a year in which a presenter has not presented or at least seen a course presented, arrangements must be made with the Course Coordinator, Course Training Coordinator, and Presenter Development Coordinator to maintain certification.

General continuing education information on leadership development, presentation skills, facilitation skills, and other relevant topics will also be provided on a monthly basis to all course Presenters electronically via the **APO LEADS** Presenters list. These monthly updates are stored in the files area of that group.

Expense

There are no required costs for becoming an **APO LEADS** Presenter, but there are some costs inherent in the performance of the job. The greatest of these costs is likely to be the copying of the course workbooks. Presenters are responsible for supplying a workbook for each participant. Workbooks average 20 pages in length. Required attendance is between 12 and 30 people for each course. Electronic copies of the workbooks are supplied to Presenters for copying via the Yahoo Group for each course. Presenters are not responsible for providing copies to presentations at Summer Leadership Weekends or National Conventions. If a Presenter absolutely cannot make arrangements to have the workbooks printed, they can be ordered from the national office at least two weeks in advance of the course presentation.

The other inherent expense in being a Presenter is travel. All presenters should be willing to travel to give the courses to students outside of their home area. The presentation is usually more effective when the Presenter is not well known to the participants. When presenting a course at a conference, it is also hoped that the Presenter will support the students hosting the conference by attending the full conference program.

All of the courses have a PowerPoint presentation associated with them. Each presenter will need some means of bringing that presentation with them. Most campuses can supply either an LCD projector to hook up to a laptop or an overhead projector to use with transparencies. It is up to the presenter to supply the laptop or transparencies.

Internet Access

APO LEADS takes advantage of the information age. Virtually everything about the program is handled electronically. Course requests are submitted via a web page and forwarded to presenters via an e-mail list at Yahoo groups. (More on the request process can be found on following pages.) All the course materials are available via the files areas of these same Yahoo Groups. Needless to say in order to be an **APO LEADS** Presenter one must have an e-mail address which is checked regularly and regular access to the internet. At the end of Content Training, Presenters will submit the email address they wish subscribed to the Yahoo Group on the Commitment form found in the appendix.

Program Name

Many refer to Alpha Phi Omega's National Leadership Development Program as simply LEADS. This name is not correct. It is **APO LEADS**. It is a statement of purpose about the fraternity as much as it is a title. The key people to make this statement are the program's Presenters.

APO LEADS is a program. Launch, Explore, Achieve, Discover and Serve are courses.

MATERIALS

There is a list of specific materials for each course at the front of its course guide. However, you may want to put together a Presenter's Kit that has basic presentation materials in it. A good Presenter is prepared to present in any situation. Here are some suggestions for your kit.

- ✓ Spare writing utensils to hand out. (Many students come unprepared to take notes.)
- ✓ Markers of many colors for presentation and for student activities
- ✓ Dry erase makers
- ✓ Dry eraser and white board cleaner
- ✓ Nail polish remover for when you use the wrong markers on the dry erase board. ☺
- ✓ Easel and pad in case there is no board. (Static-cling white board sheets are a good, reusable substitute that pack much more easily than an easel pad.)
- ✓ Masking tape
- ✓ Scotch tape
- ✓ Bulletin board pins
- ✓ Stapler
- ✓ Single sheet three hole punch
- ✓ Scissors
- ✓ Stack of manila envelopes for sending roster and evaluations to the national office
- ✓ Extension cord

For those presenters with deeper pockets:

- ✓ LCD projector ☺

And for any course a Presenter needs to have

- ✓ Course guide
- ✓ 30 participant workbooks
- ✓ 2 roster sheets
- ✓ 30 stickers (for courses other than Launch)

BEFORE, DURING, & AFTER THE PRESENTATION

The presentation process begins with the submission of a request and ends when the National Office receives the paperwork from the presentation. Here's the whole process in a little more detail.

Before

- A student associated with the requesting conference or chapter submits a request via the form on www.leadership.apo.org. (A staff member may only submit a request for a course to be held at a staff run event such as a staff retreat.)
- The request is automatically sent to the Yahoo Group for that course, and copied to the Course Coordinator, the Region LD Chair, the Presenter Development Coordinator and the National Office.
- This request is added to databases at the National Office and at the LD website and labeled as pending.
- Presenters reply to this request.
- If a specific Presenter was mentioned in the comments section of the request, the Course Coordinator checks with that Presenter.
- If any Apprentices express interest in presenting then the Course Coordinator solicits a Trainer. The Presenter Development Coordinator can assist in arranging a Trainer to do the observation
- If the request is not met within two weeks of its submission, the Course Coordinator contacts the requester as a follow-up and then reposts to the lists as well as trying personal appeals to Presenters in the area.
 - If presenters still cannot be found and no other accommodations can be made, then the Course Coordinator must notify the requestor that the course must be cancelled. This notification must be done in sufficient time to allow the requestor to make other arrangements for the time in which the course was to occur.
 - The Course Coordinator must maintain communication with the student who made the request even when the request is made several months in advance.
- When all Presenters, Directors, Observers, etc. are in place the Course Coordinator sends a message to the person who made the request stating the names of the assigned Presenters and providing the contact information of the presenter assigned as course Director. The Region LD Chair is copied on this message.
 - In the case of a conference where multiple courses are requested, one of the course Directors will be designated to serve as liaison between all the presenters and the conference student contact.
- The Course Coordinator indicates the assigned presenters on the database at the LD website and the course status is changed to assigned.
- Once a course Director is assigned, the Director is then responsible for maintaining communication with the requester.
- The course Director or designated liaison makes facility arrangements directly with the requester.
- The Director orders certificate stickers for courses other than Launch from the National Office at least two weeks before the course occurs.
- The Director makes arrangements to have copies of the participant workbooks.
- The Director makes assignments of course content to the presenter(s).
- If Observers are assigned, they help the apprentice(s) prepare to the extent needed.

- If a presenter must drop out for some reason, it is the responsibility of that Presenter to notify the Director and the Course Coordinator immediately so a replacement can be found.
- If pre-registration indicates more courses and therefore Presenters will be needed, the requester should contact the Course Coordinator. If one of the assigned presenters is contacted, the information is passed to the Course Coordinator for resolution.

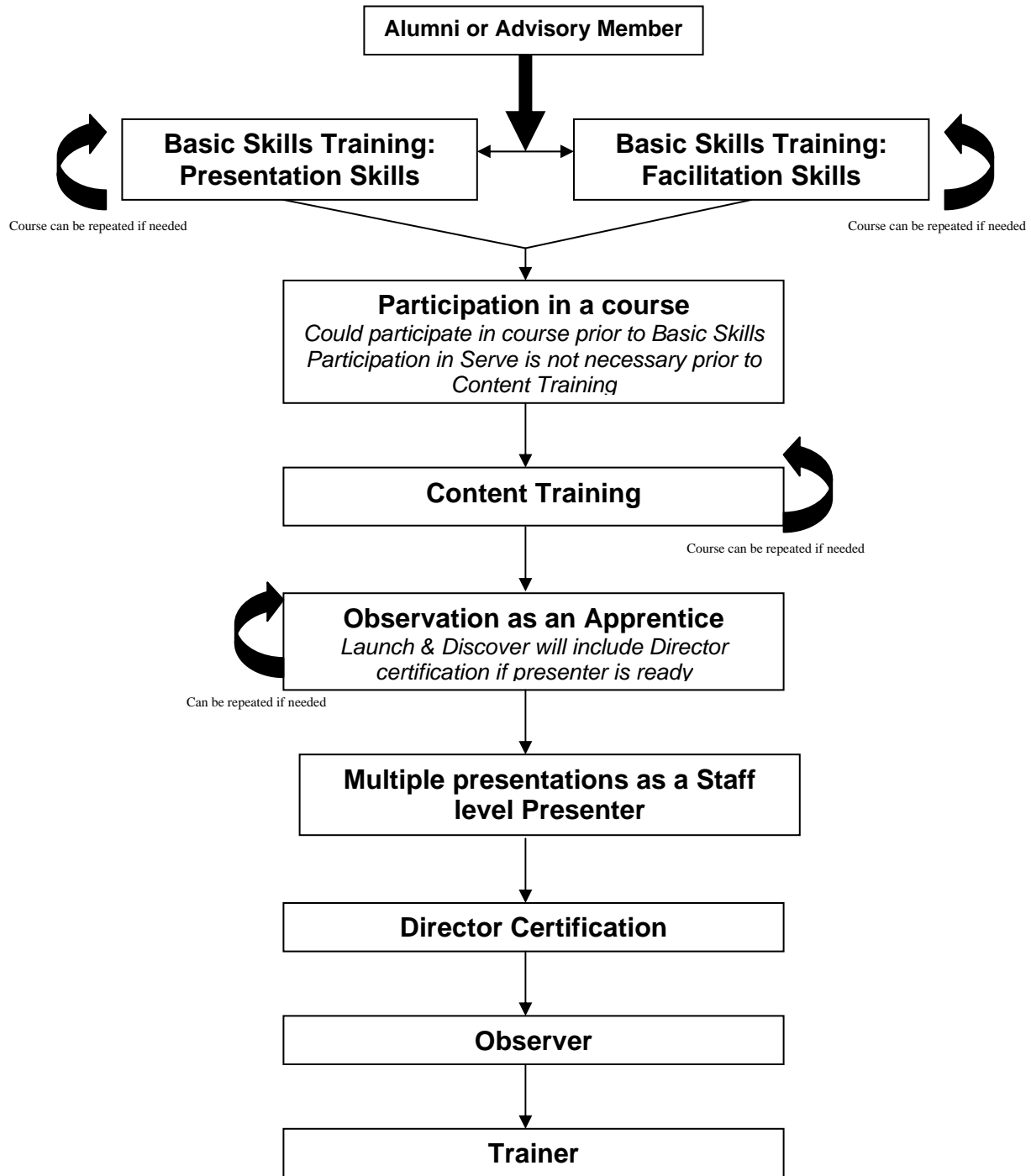
During

- If on the day of the course something such as low attendance prevents the course from being presented, the Director should notify the Course Coordinator as soon as possible.
- The course guide should be followed for the details of any presentation.
- Stickers are distributed to course participants for Explore, Achieve, Discover, and Serve at the end of the course.
- Presenters should not be in a rush to pack and leave at the conclusion of the course presentation. Allow time for the participants to chat with the Presenters. Many shyer participants will use this time to express thoughts they were afraid to share in front of the group. Be a good servant leader and allow the time to hear them out.

After

- The Director notifies the Course Coordinator that the presentation was completed.
- The Course Coordinator changes the course status in the database at the LD website to completed.
- Immediately following the presentation of the course, the Director sends copies of the roster and evaluations to the National Office. The Director should maintain their own copy of the paperwork as a back up.
- Immediately following the course the Observer, if there was one, sends copies of the feedback forms to the National Office, to the observed presenter(s) and a summary of the observation to the Trainers' Yahoo list. Eventually Observers will be able to enter this information into each Presenter's training record on the LD website.
- The LD staff member at the National Office is responsible for entering the roster into the membership database. This person also updates the website database indicating when the paperwork is received at the National Office.
- If the paperwork is not received, two weeks after the course presentation the LD staff member at the National Office will follow up with the individual presenters to ensure it is submitted.
- If the course was a Launch, the LD staff person at the National Office mails certificates to the participants listed on the course roster.
 - Certificates for active and advisory members are mailed to the chapter.
 - Certificates for staff and other alumni are mailed to the chair of the section in which they live.

PRESENTER DEVELOPMENT FLOW CHART



NOTE: Launch participation is a prerequisite to participation in the other courses. Participation may be before or after Basic Skills Training but must precede Content Training except for Serve. Passing ratings must be received to complete Basic Skills and Content Training.

TRAINING COURSES

BASIC SKILLS

Criteria for entry into Basic Skills Training:

- A desire to improve skills in facilitation and presentation

Course Description:

This level of training will consist of two modules, Facilitation Skills and Presentation Skills. It is called basic because of the commonality of the skills to all of the **APO LEADS** programs. To “graduate” a trainee must demonstrate competence with these skills.

An important point to emphasize is that ANYONE can go through the Basic Skills portion of training. Trainees prove themselves during training. Those trainees who may need to polish their skills can simply go through the necessary Basic Skills module again until they are more comfortable with the skills. In this way they can focus on improving their skills rather than being overloaded with simultaneously learning the content of a particular course.

Written feedback will be provided to the trainee at the end of each module. See the description of the evaluation system which follows and the feedback forms in the appendix.

Facilitation Skills

Course Description:

The Facilitation Skills module will teach the trainees general ideas about group dynamics, but will focus more on skills development, specifically leading groups through processing an exercise, and resolving conflict in the group. These are the central skills of facilitation that are used in the **APO LEADS** courses. The trainees will receive feedback on their facilitation skills in a variety of exercises.

What is Needed:

For this course a trainee needs to bring two exercises that can be debriefed. Any teambuilding kind of activity is fine. Name game or ice breaker types of games should probably be avoided as they do not have a lot of meaning to process. Also try to find exercises that can be done in about 10 minutes. There will be a group of approximately five to participate in the exercise. If you cannot think of any exercises, search the internet or go to the Clearinghouse. If that still does not help contact, the Director of the training course or the Presenter Development Coordinator for guidance.

Presentation Skills

Course Description:

The Presentation Skills module will focus on providing feedback to the trainees about their actual presentation behavior. Because the **APO LEADS** courses are equipped with thorough guides, minimal attention needs to be given to preparation of a course. The course content will include using Power Point, points to making memorable presentations and exercises to improve presentation skills.

What is Needed:

Those participating in this course need to bring notes from familiar material. The material does not have to be APO related. Ideally the material should be from a previously given presentation.

However, if the participant has never presented before, simply having material that is familiar is sufficient. The idea is to avoid making these presentations impromptu. Each participant will be asked to give two 5-7 minute excerpts from this material. A/V and handouts should not be used. There will be the opportunity to demonstrate skill with those materials in a different exercise and during Content Training. In PS the focus is on your skills as a presenter without props of any sort. Trainees need to demonstrate that they can stand alone without props, because of the nature of the **APO LEADS** courses, it is easy to get in the habit of using the PowerPoint as a crutch.

CONTENT TRAINING

Criteria for entry to Content Training:

- Successful completion of both Basic Skills courses
- Previous participation in the course for which training is sought

Course Description:

It is the purpose of Content Training to familiarize the trainees with the subject matter of a course. The training should provide a depth of understanding sufficient to present the material and to respond to questions from the participants in the course. The evaluation for this level of training will focus on mastery of course content knowledge as well as continued development of presentation and facilitation skills.

Trainees must pre-register for Content Training courses. Approximately two weeks before the course is held, the trainee will receive the course materials. Each trainee should familiarize themselves with the key concepts listed in the evaluation section for the course and make note of any questions they have for discussion during Content Training. The initial portion of each Content Training course is designed to deepen the understanding the trainees have developed of the course material based on their earlier participation in the course and their reading of the Facilitator's Guide. In addition to being given the course materials, each trainee will also be given presentation and/or exercise assignments to prepare. These practice assignments are for the purpose of evaluating the trainee's ability to explain the material as they will have to do during a course. The trainers and other trainees will role play participants for these practice sessions. Trainees will be given time to revise their preparation based on what is learned from the initial part of the Content Training Course, but the bulk of the preparation should be done prior to the course.

At the point of completing Content Training for a course, the Trainer leading the small group will decide whether the trainee is ready to present the **APO LEADS** course with an observer. The Trainer will discuss this information with the trainee in a brief interview at the end of the training session.

Trainees are also encouraged to practice the material on their own and with other trainees before giving their first presentation. This presenter development program makes the responsibility for familiarization and skills practice incumbent on the trainees. Although any Presenter regardless of their training level is welcome to reach out to the **APO LEADS** Trainers for assistance in their preparation.

PRESENTER LEVELS

APPRENTICE

A presenter passing Content Training is an Apprentice level Presenter. An Apprentice must then make at least one presentation with an observer present. The Trainer could be the Apprentice's co-presenter or merely an observer while the Apprentice presents with another Presenter. At the end of this first observation, the Observer will provide both written and verbal feedback to the presenter. The written feedback will be on the same forms used in the training courses and will include a statement about the Apprentice's level. For example, the Presenter may remain at Apprentice level for a multiple observed presentations, or the Presenter may be promoted to Staff and, in the case of the Launch and Discover, to Director.

STAFF

A staff level Presenter has some experience in presenting the course, but needs more experience before being ready to support other Presenters as a Director. Staff level Presenters must co-present with a Director level Presenter. As a single presenter can present Launch and Discover, most of these presenters will never be staff level. However, it can still serve as a step when more experience is needed. In the case of the Achieve, new Staff level Presenters will focus primarily on facilitating the exercises. As they gain experience they will begin to present increasingly larger portions of lecture material as well. For Explore and Serve, because of the amount and density of material with which a Presenter must become familiar, several presentations must be made before a Presenter is promoted to Director.

DIRECTOR

The key difference between Director and Staff levels is comfort with the material. When a presenter has gained enough familiarity with the material to not be distracted by administrative issues and can support a co-presenter who may have some issues with the material, a presenter is ready to direct. A Director is responsible for assigning parts of the course, and checking with the requester on facilities prior to presentation. After the presentation the Director is responsible for getting the rosters and evaluations to the national office. During the course the Director will serve as the "lead" presenter. It is the responsibility of the Director to ensure the course content is delivered accurately and clearly. If a presenter has a problem with the material, the floor should be given to the Director to complete the section, or the Director may need to summarize in a clarifying manner at the end of the section before continuing to the next section. More specifics on the Director Certification process can be found in that section.

OBSERVERS and TRAINERS

Trainers and Observers are not only experienced as **APO LEADS** Presenters, but also experienced presenters and facilitators in general. These are the people who are most directly responsible for guiding the development of Presenters by providing them with feedback. Observers will provide feedback on first presentations. Trainers have a little more experience with the content of the **APO LEADS** program and will lead the Basic Skills and Content Training

courses in addition to serving as observers for first presentations. The Presenter Development Coordinator will work with Presenters interested in becoming Observers and Trainers. Details of the process follow in the evaluation section. Observers and Trainers tend to be collectively referred to as Trainers.

COORDINATORS

Although not a Presenter Level, this section seemed an appropriate place to mention coordinators. Management of the **APO LEADS** program is the responsibility of several coordinators. Their duties are primarily administrative. Although knowledge of the course content is helpful, detailed knowledge is not necessary to be a coordinator. Excellent organizational skills are the most important needs for a coordinator. Specific job descriptions of each of the coordinators can be found on the LD site under organization. A brief outline of the working structure of the coordinators can be found in a diagram near the end of this guide. That diagram is not comprehensive as there are other coordinators on the LD Committee whose duties may impact the **APO LEADS** program as well. Presenters interested in working toward becoming a coordinator should speak with the person currently in that position and the Presenter Development Coordinator. Coordinators are appointed by the Fraternity's National President at the recommendation of the Leadership Development Program Director.

TRACKING

As of this writing the on-line database described below is still in the process of being created. Currently Presenters should be receiving a hard copy of any feedback they have been given. A copy of that feedback is also sent to the National Office for filing.

A record of trainees as they progress through the levels of training will be maintained in the database that is part of the National Leadership Development web site. A record will be created for each time a Presenter is observed this includes Basic Skills courses, Content Training Courses, observations as an apprentice, etc. Each person can view their own training record. Course Coordinators can also view the information as it will assist them in making assignments. Trainers and Observers are the only ones who can edit the information. The information will be used to guide each Presenter's future training. Hopefully each Presenter will also use this on-going access to their feedback to help develop skills.

It is the responsibility of the Trainers to build the database by entering their observations into the form. They must also update the level of the presenter if a promotion is made and the date of the Presentation for both themselves and the Presenter they observed. Course Coordinators are responsible for updating the level and date when an observation is not involved. Trainers who run training courses are also responsible for entering dates that a Presenter passes a training course.

Additionally all the information, rosters and evaluations, from course presentations will be submitted to the National Office for entry into the membership database. It is based on this information that Launch certificates are sent. The course Director is responsible for delivering this material to the National Office.

EVALUATION SYSTEM

The evaluation system is designed to be as objective as possible. People must demonstrate certain skills in order to progress through the system. Trainers will be able to apply these standards equally across all trainees.

Peer review is a vital part of the evaluation process at all levels of **APO LEADS** training. This a basic feedback system of, “what was done well” and “what needs improvement”, is provided by the other members of the training group. The Peer Review Evaluation form is provided in Appendix I. Peer Reviews allow each person more feedback on their skills than just the review of one or two Trainers. Again we are following the philosophy of providing feedback to improve skills. It is hoped that even after certification, presenters will seek out their peers to continue to provide and receive feedback. Seeking feedback in the future is another reason a copy of each feedback form is a part of this guide.

There is a feedback form for the two Basic Skills Modules and for professionalism. The same forms will be used to evaluate presenters during Content Training and first presentations as Apprentices. Examples of desirable and undesirable behaviors are provided for each category. In addition to the undesirable behaviors actually listed, the negative of each desirable behavior should also be considered. The example behaviors are summarized by a key question that is asked in each category. Each category of skills is rated on a five-point scale. The rating will provide an answer to how well that presenter addressed the key question. Besides the rating, specific comments will be provided to help the trainee develop. Although the rating scale of each skill category has specific behavioral anchors, the ratings are based on the following general scale

- 1 - Poor (none to few desirable behaviors present)
- 2 - Needs Work
- 3 - Average
- 4 - Very Good
- 5 - Excellent (no undesirable behaviors present)

Note about receiving feedback: When being given feedback by a Trainer or a peer, listening is the most important skill involved. Often people become embarrassed or defensive especially in the case of negative feedback. Trainers will not give feedback in an attacking or derogatory manner. It is everyone’s intent to help each person grow. Sit quietly and listen carefully to everything that is said. Read the feedback form. Then ask questions to clarify anything you do not understand. It is alright to state you also caught a mistake, that shows insight into your own skills and is a skill in itself. It is also OK to point out something you thought you did well and ask if it was perceived in the same way. Make the feedback a dialog. Avoid offering excuses or trying to explain away something that went wrong. All the Trainers are experienced presenters and got that way by making their own mistakes in front of audiences. They understand. You do not have to explain. At the same time do not be intimidated by the Trainer. That person is there to help you, make use of the Trainer. Finally, and most importantly, do not discount praise. We are often our own worst critics. Even if you feel you made a big mistake on a part or did not do what you wanted, it probably was not perceived that way. Trainers are not just being nice when they give you praise. They are trying to reinforce the things you do well. Hear that as loudly as you hear the criticisms.

Basic Skills Training: General

The following two sections will discuss the specific expectations for the Presentation and Facilitation Skills modules. At the Basic Training level a presenter must receive ratings three or above in each category and the endorsement of the Trainers to progress to Content Training. Those not endorsed for Content Training are welcome to retake the necessary Basic Skills module to improve those skills.

Basic Skills Training: Presentation Skills

The Presentation Skills module will have at least four opportunities for each trainee to make a presentation. More opportunities will be provided if time allows. These opportunities will include both impromptu presentations and presentations of excerpts of material the trainee has brought to the course. The categories on the feedback form are very broad. What follows is a list and explanation of the specific skills that are being evaluated as part of each category on the presentation skills feedback form. The form itself can be found in Appendix I.

Appropriate Emotion Effectively Conveyed

Desirable Behaviors Examples

- Appears comfortable
- Controls nervousness
- Projects confidence
- Engaging
- Believable
- Persuasive
- Provides excitement for topic while remaining professional
- Tone
- Voice modulation

Undesirable Behaviors Examples

- Tries too hard to entertain
- Nervous
- Reads material
- Monotone
- Draws attention to own mistakes

Key Question: How effectively does the presenter convey enthusiasm for and confidence in the topic?

Rating Scale

- 1 - So nervous, negative or disinterested that the audience is turned off
- 2 - Occasionally shows enthusiasm; undermines material through attitude
- 3 - Moderate range of enthusiasm audience is engaged and interested at least 50% of the time
- 4 - Confident and engaging most of the time. Getting audience buy-in.
- 5 - Enthusiastic, contagious positive energy

Effective Use of Language

Desirable Behaviors Examples

- Uses descriptive language (adjectives, metaphors)
- Uses language appropriate for audience (does not sound like a dictionary but does not talk down to the audience either)
- Uses appropriate grammar

Undesirable Behaviors Examples

- Verbal pauses (uhm, alright, ok, so etc.)
- Jargon including acronyms
 - if some jargon is relevant to topic, educates audiences about meaning before using repeatedly
- Slang
- Cursing
- Over using metaphors so that message is lost

Key Question: How well does the presenter select words and put them together?

Rating Scale

- 1 - Choice and use of words detract from conveying content
- 2 - Can occasionally make self clear
- 3 - Some grammar or other language problem
- 4 - Minimal inappropriate language used
- 5 - Unknown terms defined, metaphors are clear and enhance understanding

Audibility

Desirable Behaviors Examples

- Projection, can be heard in the back of the room
- Emphasizes points through voice volume modulation
- Enunciation
- Speaks at good pace

Undesirable Behaviors Examples

- Speaking too softly
- Shouting (get and use A/V if room or audience too large, or just don't have the vocal power)
- Regional dialect or speech impediment significantly interferes with being understood

Key Question: How effectively does the presenter use his/her voice?

Rating Scale

- 1 - Cannot be heard or understood or speaks only in a monotone
- 2 - Can make self heard or understood for brief periods
- 3 - Can be heard and understood fairly, but tends to speak too quickly
- 4 - Pacing is quick or some work needed on articulation
- 5 - Speech is clear and coherent, Can be heard clearly throughout the room

Organization

Desirable Behaviors Examples

- Room and A/V set up before hand
 - allows enough prep time if using computer and projector
 - ensures writing material and easer present
 - designates writer before presentation if needed (wanted)
- Prepared, clearly familiar with material
- States clear session objectives
- Easy to follow
- Previews and summarizes
- Clear start and end
- Good transitions between sections
- Collects evaluations at end of session

Undesirable Behaviors Examples

- Loses place in notes frequently
- Appears not to have read material recently

Key Question: How well does presenter's preparation contribute to smoothness of delivery?

Rating Scale

- 1 - Completely unprepared
- 2 - Evidence of preparation but minimal
- 3 - Content appears prepared but has problems with slides (or vice-versa, using slides as crutch)
- 4 - Material prepared but each section is circumscribed, no transitions, previews, reviews, etc.
- 5 - Obviously well prepared, knows material, slides and manual very well. Links sections well

Effective Body Language

Desirable Behaviors Examples

- Gestures enhance statements
- Moves around speaker's area, does not remain in one spot
- Dresses appropriately
- Use of physical self to engage audience
- Supports and challenges participants through body position
- Has good posture
- Facial expression is animated
- Uses touch-turn-talk effectively

Undesirable Behaviors Examples

- Talks with hands to point of being distracting
- Grips podium for dear life
- Paces to distraction
- Hands in pocket frequently
- Jingling pocket contents
- Sits most of the time
- Turns back to audience to read from screen

Key Question: How effectively does the presenter use his/her body to communicate?

Rating Scale:

- 1 - Lack of movement detracts from understanding the material
- 2 - Movement used ineffectively -- distracts the audience
- 3 - Movement and gesture becoming natural but used only moderately
- 4 - Good movement including only part of room or good gestures inconsistently
- 5 - Movement and gestures are natural, supportive of statements made, serves to further engage audience

Audience Contact

Desirable Behaviors Examples

- Eye contact throughout audience, not just one person or section
- Checks for understanding
- Responsive to questions
- Responds appropriately to audience looking confused or bored
- Keeps audience engaged
- Notices audience's note taking speed and adjusts speed of presentation
- Adapts learner needs
- Controls activity in room
- Uses examples to which most of audience can relate
- Generally good application of facilitation skills

Undesirable Behaviors Examples

- Ignoring a hand up even if planning to come back to that person after making point
- Continuously calling on same person for responses
- Keeps talking while writing on board
- Belittling audience members
- Conversations with one or two audience members (gets others involved when audience member tries to monopolize discussion)
- Uses too many personal examples (e.g. "In my chapter... or "I think")

Key Question: How well does the presenter connect with the audience?

Rating Scale

- 1 - Primarily lectures and few audience interactions are perceived negatively
- 2 - Lectures only does not interact with the audience
- 3 - Checks for understanding at end of each lecture section
- 4 - Asks for examples throughout lecture, responsive to nonverbal cues of audience
- 5 - Provides information in context of guided discovery, partners with audience on a journey of learning

Pacing and Timing

Desirable Behaviors Examples

- Starts on time
- Ends at allotted time
- Material well distributed across allotted time
 - able to shorten parts if others run over without audience noticing

Undesirable Behaviors Examples

- Goes over time
- Goes way under time
- Rushes presentation to finish early or rushes end of presentation because earlier part took too long

Key Question: How well does the presenter use the allotted time?

Rating Scale

- 1 - Runs over or under by more than 25% of the total allotted time,
- 2 - Somewhere between 1 & 3
- 3 - Total time runs no more than 10% over or under (that is 15 min in a 3 hour course)
- 4 - Has one or two sections that run over slightly, time made up by obviously rushing another
- 5 - Starts on time, stays within time, able to adjust for sections running long or short without missing content

Conveys Knowledge Appropriately

Desirable Behaviors Examples

- Recognizes to audience material being presented is only one way of approaching these issues
- Manages group interaction
- Listens respectfully to audience questions and comments
- Motivates interest and involvement
- Promotes action planning
- Provides effective feedback
- Demonstrates effective questioning skills
- Links content topics
- Stays on topic
- Makes answers to off-topic questions relevant if possible or asks for the question again after the session

Undesirable Behaviors Examples

- Inadvertently dismissing or undermining the credibility of the material
- Overstates authority of material
- Arrogant or pedantic

Key Question: How well does the presenter do at being an expert teacher of this material?

Rating Scale:

- 1 - Presenter seems primarily self-conscious rather than engaged with the audience's learning as demonstrated by reading majority of presentation straight from guide or slides
- 2 - Presenter knows the presentation but has trouble addressing questions
- 3 - Presenter conveys a basic knowledge of the topic but shows lack of understanding
- 4 - Presenter conveys mastery of the material and ideas and provides for the understanding of the audience
- 5 - Presenter has enough experience with the material to adapt presentation "on the fly" to needs of the audience and assists co-presenters without detriment to audiences' understanding.

Basic Skills Training: Facilitation Skills

Unlike presentation, facilitation can take many forms. A simplistic explanation of facilitation is “teaching through interaction and experience”. All skills may not be equally relevant depending on the nature of the task before the group. During this course trainees will have the opportunity to practice various parts of the facilitation process and to facilitate learning exercises (games) they will bring with them. All these practice opportunities will be evaluated using the following form and criteria. Again more opportunities will be given for practice as time allows. The feedback form follows category breakdowns of the skills being assessed. The form itself can be found in Appendix I.

Appropriate Emotion and Attitude Conveyed

Desirable Behaviors Examples

- Remains neutral to discussion
- Projects positive, optimistic attitude
- Remains calm and pleasant at all times
- While remaining professional, models having fun with the games

Undesirable Behaviors Examples

- Is critical of ideas offered by group members

Key Question: How well does facilitator’s attitude support the group?

Rating Scale:

- 1 - Conveys negative or dismissive attitude about game or discussion
- 2 - Attitude toward group members is flat because so focused on game
- 3 - Cheerful but stiffness or nervousness is detectable
- 4 - Positive attitude remains in place through most stressors
- 5 - Able to project confidence and positive attitude even when game/discussion goes awry

Effective Body Language

Desirable Behaviors Examples

- Maintains eye contact with speaker
- Listens actively
- Uses facial expressions and hand gesture to draw group members out

Undesirable Behaviors Examples

- Not appearing attentive to group’s work

Key Question: How well does the facilitator use his/her body to enhance group learning?

Rating Scale:

- 1 - Does not physically react to group’s actions
- 2 - Uses eye contact; occasionally listens actively; minimal movement
- 3 - Actively listens and uses some gestures to engage group
- 4 - Responsive to group physically
- 5 - Eagerly attentive, gets group to talk without saying much

Activity Set-up

Desirable Behaviors Examples

- Has group do introductions as needed
- Explains task clearly and checks for understanding
- Sees recorder is assigned as necessary

Undesirable Behaviors Examples

- Starts activity when group still confused as to what they are supposed to be doing

Key Question: How well does the facilitator get the group started?

Rating Scale:

- 1 - Reads rules and starts group without asking for questions (group appears frustrated from outset)
- 2 - Conveys instruction, checks for understanding but does not clarify or address initiation barriers
- 3 - Checks for understanding after rules given but also essentially gives lens with rules
- 4 - Conveys instruction, checks for understanding but has trouble monitoring learning at initiation of activity
- 5 - Gives rules, checks for understanding, and is supportive of group members who appear unsure

Group Dynamics

Desirable Behaviors Examples

- Effectively uses reflective listening and paraphrasing to ensure all group members are heard
- Supports group leader, if there is one
- Ping-pongs ideas around
- Keeps group on task without letting the group identity suffer
- Frequently checks-in with group, asks “how are we doing?”
- Gets everyone involved in discussion
- Helps group define problems to be solved
- Accepts and uses feedback
- Allows for enough group failure to be instructive, but not too much to be distracting

Undesirable Behaviors Examples

- Dominates group, tries to be the center of attention
- Allows conflict between group members to continue
- Loses track of key ideas
- Talks too much
- Fails to curtail overly talkative responders

Key Question: How attentive is the facilitator to the relationship between the group members?

Rating Scale:

- 1 - Makes a group member feel bad for not doing it right
- 2 - Does not make group feel like a team; essentially continues lecture
- 3 - Generally attentive to all group members just needs to get more energy within the group
- 4 - Able to generate positive group feeling with all but a few more challenging group members
- 5 - Entire group feels like a team by end of exercise; feeling only increases after multiple exercises

Process and Debrief

Desirable Behaviors Examples

- Effectively uses what, so what, now what so group “gets” the exercise
- Redirects group when it gets bogged down on an issue
- Takes problem solving approach
- Asks relevant probing questions
- Can adapt to different from intended lens suggested by group
- Artfully asks questions to have group arrive at lens
- At end of process summarizes what group said in way that makes lens clear

Undesirable Behaviors Examples

- Tells the group what they should have learned rather than encouraging them to explore it for themselves
- Allows the group to be sidetracked
- Makes authoritative statements to group rather than asking questions
- Rigidly adheres to original lens and only one way of stating it
- When accepting responses gives impression some answers are wrong

Key Question: How effectively does the facilitator guide the group to what can be learned from exercise?

Rating Scale:

- 1 - Lectures group on what they should have learned from exercise
- 2 - Has group give some responses but gives group summary statement that is essentially the lens
- 3 - Gets a few “right” answers then moves on without ever getting application (now what)
- 4 - Sufficiently covers complete debrief but has difficulty making lens clear when group has ideas that aren’t right on target; or, debriefs well but omits summary
- 5 - Covers entire debrief including exposition of lens through questioning then makes good summary

Pacing and Timing

Desirable Behaviors Examples

- Knows when to stop, doesn’t beat a dead horse with processing
- Gently urges group leader toward staying on time throughout exercise
- Gives warnings toward end of group work time (10, 5 minute whatever appropriate)
- Moderates time between presenter points and audience comments

Undesirable Behaviors Examples

- Goes over allotted time
- Goes way under time

Key Question: How well does the facilitator use the allotted time?

Rating Scale:

- 1 - Runs over or under by more than 25% of the total allotted time,
- 2 - Somewhere between 1 & 3
- 3 - Total time runs no more than 10% over or under (that is 15 min in a 3 hour course) or shorts debrief because game ran long
- 4 - Has one or two sections that run over slightly, time made up by obviously rushing another
- 5 - Starts on time, stays within time, able to adjust for sections running long or short without missing content

Basic Skills Training: Professionalism

Unlike presentation and facilitation skills, professionalism does not have a particular course associated with it. However, it is still an important set of skills that should be sufficiently *basic* to Presenters of a National Program as to require feedback to be given. The amount of feedback given on professionalism will vary depending on the feedback situation. There will be more feedback given during course observations than training courses, and longer courses will have more opportunity for feedback. For example, Serve involves essentially living with the participants for the weekend, therefore will provide the most opportunity for professionalism feedback.

Professionalism includes everything from physical appearance to sexual inappropriateness, during both the structured and unstructured time of courses (presentation vs. breaks). Many of the issues involved in professionalism are intangible. The following is an attempt to operationalize some of those abstract issues. Remember, professionalism is in the eye of the beholder.

Appearance

Desirable Behaviors Examples

- Wears business casual clothing
- Is neat in appearance

Undesirable Behaviors Examples

- Clothing is badly wrinkled
- Noticeable body odor
- Wearing jeans

Punctuality

Desirable Behaviors Examples

- Arrives well before course start time
- Sets up (helps Director set up) room before participants arrive
- Is ready to greet participants as they arrive

Undesirable Behaviors Examples

- Rushes in after the Director has already started the course

Examples

Desirable Behaviors Examples

- Examples used during presentation are inoffensive

Undesirable Behaviors Examples

- Foul language is used
- Some example used make others personally uncomfortable

Behavior during another Presenter's part

Desirable Behaviors Examples

- Appearing attentive
- Listening respectfully
- Following along in guide
- Quietly reviewing next portion of presentation

Undesirable Behaviors Examples

- Sleeping
- Running in and out of room

Small group preparation

(primarily applicable to Serve)

Desirable Behaviors Examples

- Makes notes on group interaction
- Makes use of time outside of group to ask questions of small group facilitator about group dynamics

Undesirable Behaviors Examples

- Interferes with group process
- Acts as if member of group

Socialization during unstructured times

Desirable Behaviors Examples

- Interacts with participants in a manner that acknowledges a difference in roles
- Demonstrates respect to participants despite a difference in roles

Undesirable Behaviors Examples

- Flirting with participants
- Being inaccessible to participants during unstructured times
- Initiating what could be perceived as intimate physical contact (e.g. massage)

The last category is sufficiently intangible that it desires a little further discussion. It is inappropriate for a Presenter to flirt with a course participant, even when it is initiated by the participant. There is no implied moral judgment here of relationships with age differences; only a suggestion that the participant involved and the participants watching will be less likely to take seriously the words of a Presenter who cannot maintain appropriate professional boundaries. Presenters are to be Servant Leaders. The characteristics of a Servant Leader include Building community. It is difficult to establish that feeling of community (a sense of trust) among course participants and with the Presenter if there is a perceived favorite.

Because most of the issues involved in professionalism are intangible, if a Trainer or a peer provides feedback that a particular behavior is perceived as unprofessional, it should be given some reflection. People considering giving such feedback may wish to check with others to see if there was a similar reaction to the behavior. Even if there was not, it is still worth providing the feedback. A Presenter should be made aware that some said or done made even one person a little uncomfortable. No one sees their own behavior in the same way as others. What one may do in innocence may not always be perceived in the same way. Though occasionally uncomfortable, it can be helpful when a mirror for our behavior is held up. Consider the “blind self” quadrant of the Johari Window discussed in Discover. Hopefully everyone will be a Servant Leader committed to growth and increasing awareness.

Feedback on professionalism can be given in the General Comments section of either the skills feedback forms or on the separate form for professionalism feedback. The latter is designed primarily for use with Serve apprentice but can certainly be used in other situations when deemed appropriate. There are no behavioral anchors for the ratings. It is simply on a 1-5 scale of poor to excellent.

Content Training: General

The primary purpose of Content Training is to familiarize a trainee with the material to be presented in a course. This familiarization will be done through discussion of the material and presenting portions of the course. Evaluation at this level will focus on a trainee’s understanding of the material. Additionally, the skills evaluated during Basic Skills Training will continue to be evaluated throughout Content Training as they are applied. To be a fully certified **APO LEADS** Presenter for one of the courses, a majority of ratings must be four or above. For

those Content Training courses focusing on facilitation skills, the rating for Process and Debrief may not be less than three. Ratings less than three in this category indicate that much work is needed on facilitation skills. In addition to retaking the Content course, a trainee in this position may also wish to retake the Facilitation Skills course.

Content Training: Launch

An **APO LEADS** Presenter certified for LAUNCH must be able to explain the following concepts:

- Servant Leader Model
- Servant Chapter Model
- Relationship of the two models
- A general outline to achieve conflict resolution
- Why SMARTER is a useful means of goal setting
- Importance of clear communication and what can provide barriers to that
- Why some of these concepts are not explained in more detail in this course
- Which of the **APO LEADS** courses to attend to further develop certain skills

Presenters will be given feedback on their practice presentations on the presenter feedback form.

Content Training: Explore

An **APO LEADS** Presenter certified for Explore must be able to explain the following concepts:

- Effect of individual differences on what is valued in a leader
- Qualities of a leader
- Situational Leadership and its relation to the Servant Chapter Model
- How Situational Leadership builds on the concept of relationship vs. task introduced in the Launch
- Ethical Decision Making
- Decision Making
- Problems Solving
- The relationship of the above two concepts
- Conflict Resolution
- Why it can be said that the entire Explore actually focuses on Conflict Resolution
- How Conflict Resolution is impacted by philosophy of Servant Leadership

Presenters will be given feedback on their practice presentations on the presenter feedback form.

Content Training: Achieve

An **APO LEADS** Presenter certified for Achieve must be able to explain the following concepts:

- Servant Chapter Model in the context of teamwork
- Stages of Team Development
- Importance and Foundations of Unity of Purpose
- Team Achievements Model and its relation to the Servant Chapter Model and Stages of Team Development
- Importance of working with teams as a leadership concept

and demonstrate the following skill set:

- Ability to teach through experiential learning

Practice sessions in Achieve Content Training will focus on the exercises and tying them to the lecture portions, rather than focusing the lecture portions. Presenters will be given feedback on their practice exercises on the facilitator feedback form.

Content Training: Discover

An **APO LEADS** Presenter certified for Discover must be able to explain the following concepts:

- Johari Window
- Why it is important to understand your own and others' Interpersonal Style
- Importance of being assertive
- Self-Motivation
- Time Management
- Stress Management
- Be able to relate all of the above to being a Servant Leader in terms of specific behaviors

Presenters will be given feedback on their practice exercises on the facilitator feedback form.

Content Training: Serve

An **APO LEADS** Presenter certified for Serve must be able to explain the following concepts:

- Why effective meeting management is important
- How effective meeting management relates to the relationship vs. task concept
- Components of Project Management
- How effective project management is important to every role in the fraternity
- How to effectively delegate and how a Servant Leader empowers others through effective delegation
- Public Relations
- The link between project management & strong chapters

And demonstrate the following skill sets:

- Facilitate a group in experiential learning activities
- Supporting a group discussion as a facilitator

The Content Training for Serve will be embedded in the Serve itself. Therefore it will not be necessary for trainees to attend a Serve prior to completing SCT. Any Presenter who wishes to attend Serve prior to training is certainly welcome to do so. Because Serve will only be offered four times a year during the summer, it may be difficult to attend both the course and the training. It is hoped that more experienced **APO LEADS** Presenters will be willing to be trained as Serve Presenters. Serve is a very intense weekend experience that requires a skilled facilitator to maximize the experience for the participants. In other words, Serve should not be the first course for which a Presenter is trained. In addition to training in the content of the course, SCT will include further training in facilitation skills beyond that of the Basic Skills course focusing on guiding group discussion and project work.

Presenters will be given feedback on their practice exercises on the Facilitator Feedback form, on practice presentations on the Presenter Feedback form, and overall professionalism throughout the weekend on the Professionalism Feedback form. In addition to the practice session typical of any of the content courses, SCT participants will also sit in on a small group throughout the weekend. Their primary goal is to observe how the group leader facilitates the small group while they work on the project. Serve trainees are encouraged to ask the group leader about why they handled certain situations as they did outside of group time. During apprenticeship, Serve Presenters will co-lead a small group with an experienced Presenter in addition to presenting a lecture and Large Group Exercise. A Serve apprentice will receive feedback on presentations, facilitating large group exercises, facilitating their small group's discussion, and on overall professionalism during the weekend. It is possible that a different Trainer or multiple Trainers will be providing feedback for each of these areas.

Director Certification: All Courses

There are two key parts to becoming a Director. First a Director must have a sufficient depth of understanding of the material to be able to assist less experienced presenters with its presentation if needed. Secondly, a Director is responsible for all the administrative aspects of a course presentation. To become certified as a Director, a potential Director, or Director in Training (DIT), must direct a course under the guidance of a certified Director at least once. A Director is responsible for:

- distributing the workload among the presenters
- obtaining materials such as workbooks and stickers for the course
- ensuring the space provided will meet the needs of the course
- writing and adhering to the schedule for the course
- recording names of course participants on course roster
- be a resource to the other course presenters
- troubleshoot problems that may arise during the course presentation
- distributing and collecting completed evaluations
- sending rosters and evaluations to the National Office
- assisting the Course Coordinator is recruiting presenters for presentation, if needed
- assisting requester in course promotion as needed

At the end of directing that course, the experienced Director will provide feedback to the trainee as to directing a course and what areas of improvement there might be.

Director Certification: Launch & Discover

Because a single presenter will typically give Launch and Discover, an observer must certify each presenter before presenting alone. This certification will be done in the spirit of Director Certification of the other courses. Following successful completion of Content Training, each trainee will work with the Course Coordinator and Presenter Development Coordinator to present the course with an Observer who can step in to help if problems arise. Between the completion of Content Training and this first presentation, trainees are **STRONGLY** encouraged to practice the course with the other trainees.

At the end of this observation, the Observer will indicate if the trainee is ready to proceed to the next training step only if that person is ready to be a Director. If there is a problem with skills, knowledge of course content or administrative issues, the Observer will indicate whether that person is to remain an apprentice or be designated as staff and will provide specific feedback on what skills need to be developed to gain the level of Director.

Director Certification: Serve

Although a Serve Director has the same responsibilities as any other course Director, the Serve Director has additional responsibilities relating to the logistics of a weekend long course. A Serve Director's success may be enhanced by experience in event planning, serving as a conference chair for example. There are so many logistical issues that another person, the Site Coordinator, is assigned to assist with the weekend. The Site Coordinator should be an alumni member who lives near the facility and, ideally is familiar with the facility. That person will serve as a liaison between the National Office staff member responsible for facilities contracts and the site, and between the Director and the site. Everything logistical is the responsibility of the Site Coordinator; everything programmatic is the responsibility of the Director. Naturally there are some points of overlap. The Site Coordinator duties are available in another document through the Serve Coordinator. Because a Site Coordinator has no program responsibilities, that person does not have to be a Presenter and therefore may not have access to the Serve Facilitator's Guide. Duties required of a Serve Director in addition to those listed above for all Directors

- keeping aware of number of participants registered and adjusting the number of small groups appropriately
 - If there is more than one Serve at the site, this may involve coordinating with another Director.
- obtaining information about meeting room availability, meal schedules, building schedules and housing from Site Coordinator
- coordinating room usage if there are not enough break out rooms for each small group to have its own
 - Again this may involve coordination with another Director and the SCT Trainer
- adjusting program schedule around meal and facility closing times.
- coordinating schedule with SCT Trainer to allow trainees to observe small groups
- making housing assignments
 - participants from the same chapter should not be housed together
 - it might be effective to house members of the same group together
- arranging transportation between meeting space and sleeping quarters, if needed
- running quick debrief meetings with the other Presenters at the end of each night and during breaks as needed
- pairing Apprentices with Trainers to run a small group
 - It is the responsibility of the Serve Coordinator to see that there are Trainers assigned to a Serve to which an Apprentice is also assigned
 - The training of that Apprentice is that Trainer's responsibility not the Director's. However, the Trainer should work with the Director to ensure the Apprentice is assigned appropriate material to facilitate development. It is the Apprentice's responsibility to tell both what has been done before.
- making sure there is not only a laptop and projector for the presentation but also that there is at least one additional computer on which the project CDs can be burned
- asking assigned Presenters to bring additional laptops in case a group does not have one
- supplying the Serve Coordinator with the e-mail address of each participant for adding to the Serve graduate Yahoo Group
 - a copy of the files placed on the CD also needs to be sent to the Serve Coordinator for uploading to the files area of that Yahoo group

The Serve Director does not have to make arrangements for workbooks and stickers. A box will be sent to the Site Coordinator which will contain workbooks, stickers, project journals, materials for exercises (detailed list in course guide), **APO LEADS** banner(s), and blank CDs. However,

a well prepared Director may wish to have personal back-ups of these materials in case something is missing from the kit sent. The Director must return the banner to the National Office or make arrangements for its travel to the next Serve. The promotion from DIT to Director is the same process as all other courses, though it may take multiple courses of serving as a DIT to become sufficiently familiar with all the duties of Serve Director.

Becoming an Observer

Successful Observers are people who excel in evaluating presentation and facilitation skills, and, more importantly, are successful in delivering feedback on those skills in a manner that allows growth for the Presenter. The path for becoming an Observer is to assist in running a small group for Basic Skills and Content Training Courses. Initially the observer in training will essentially be another peer reviewer though the appropriate feedback form will be completed. Before the individual feedback sessions the Observer (Small Group Leader) and observer in training should fill in ratings and compare their forms. Any significant differences in observations should be discussed and the Observer should guide the observer in training toward adherence in the rating system. The training period is a time of establishing interrater reliability for the new observer. Even experienced Observers should take advantage of opportunities to co-observe and reaffirm interrater reliability. The observer in training should watch the Observer give individual feedback adding comments as appropriate.

As the observer in training becomes increasingly comfortable with giving feedback, as judged both personally and by the Observer with whom they are working, across multiple courses, the lead in giving feedback both in the group and individually should shift to the observer in training. The observer in training must learn to give both positive and negative feedback in a supportive manner. One of the hardest things about being an Observer is telling a friend and a Brother that their skills are not strong enough to advance, in a manner that will not deter them from continuing with the program. Not everyone is going to be a brilliant presenter straight out of the chute. It is a set of skills that needs to be developed. When an Observer feels ready to take the responsibility for helping a Presenter develop and an experienced Observer is comfortable with feedback ability, that is when someone is ready to run a Basic Skills small group individually. The criteria is subjective which is why there's a lot of variation in paths people take to being a trainer. Running a small group for a Content Training course or doing first presentation observations requires all of the above skills and sufficient comfort with the course content to provide feedback on its presentation. This comfort level is somewhat deeper than that of a Director.

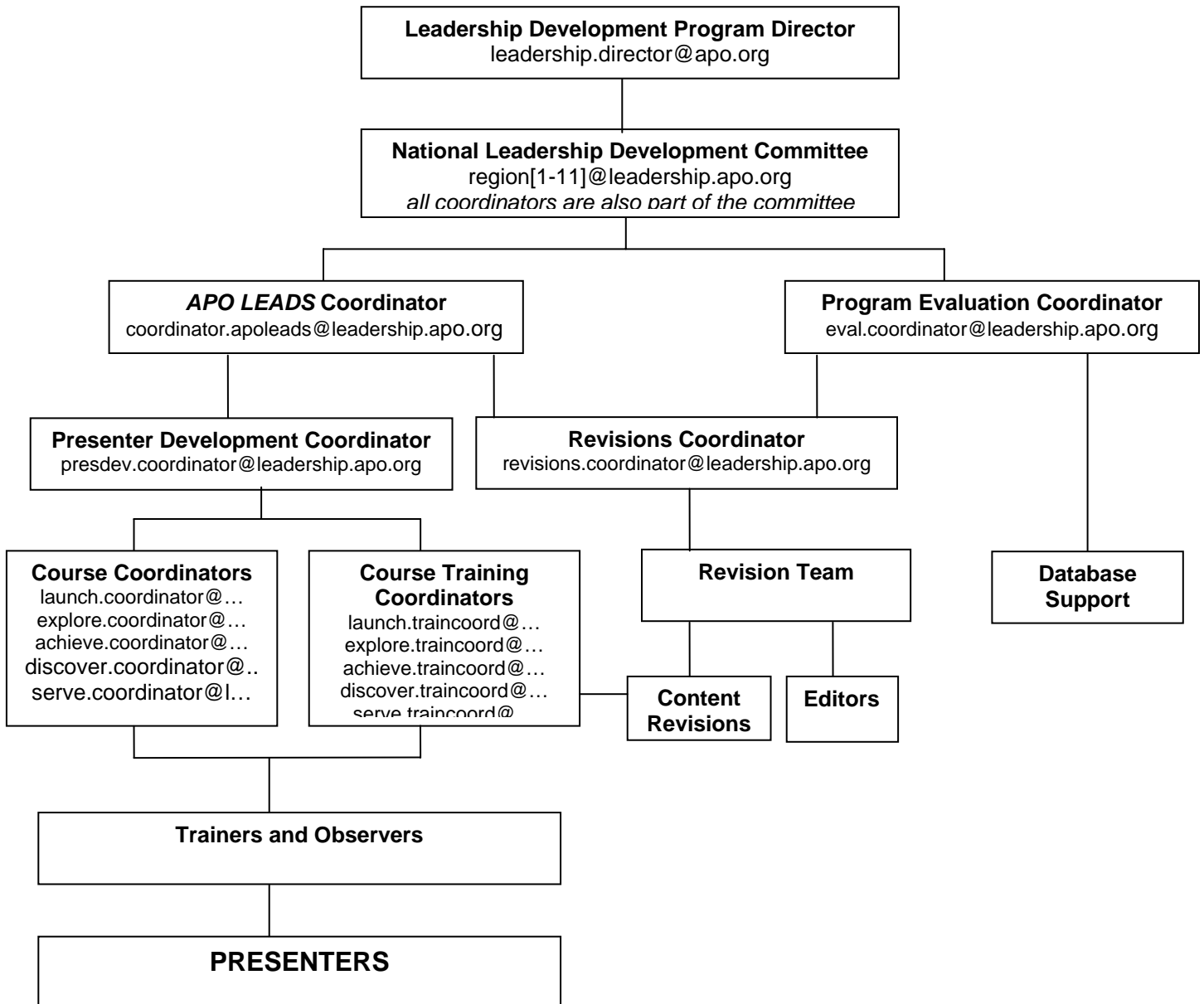
Becoming a Trainer

The difference between Observer and Trainer is much like that between Director and Staff. Trainers are the people who direct the training courses. They have a greater depth of knowledge of the course content. They can lead the talk through portion of the Content Training courses because they are familiar with a variety of ways to explain the material, the common sticking for participants and how to deal with them, are sufficiently professional to model such behavior appropriately for the trainees, and have the depth of knowledge to teach the content to the trainees at a level deeper than is presented to participants. Trainers also are sufficiently familiar with the course structure to make assignments of practice material to the small groups that will maximize each trainee's learning experience while adhering to the time frame for the course. Observers become Trainers for a course by repeatedly leading small groups for that course and continuing to present the course.

QUESTIONS?

If you have any questions about the **APO LEADS** Presenter Development program or about the **APO LEADS** program in general, please let us know contact the appropriate person below.

APO LEADS PROGRAM MANAGEMENT TEAM



APPENDIX I: FEEDBACK FORMS

Presenter Feedback

Presenter: _____ Evaluator: _____ Date: _____ Site: _____

Use rating scales from Presenter Development Guide to provide feedback.

Appropriate Emotion Effectively Conveyed: _____

Effective Use of Language: _____

Audibility: _____

Organization: _____

Effective Body Language: _____

Audience Contact: _____

Pacing and Timing: _____

Conveys Knowledge Appropriately: _____

Is this presenter ready to proceed to the next training step? YES NO

General Comments

Facilitator Feedback

Facilitator: _____ Evaluator: _____ Date: _____ Site: _____

Use rating scales from Presenter Development Guide to provide feedback.

Appropriate Emotion and Attitude Conveyed: _____

Effective Body Language: _____

Activity Set-Up: _____

Group Dynamics: _____

Process and Debrief: _____

Pacing and Timing: _____

Is this facilitator ready to proceed to the next training step? YES NO

General Comments

Professionalism Feedback

Presenter:	Evaluator:	Date:	Site:	
1-Poor	2-Needs Work	3-Average	4-Very Good	5-Excellent

Appearance: _____

Punctuality: _____

Examples: _____

Behavior during other Presenter's parts: _____

Small group preparation: _____

Socialization during unstructured times: _____

Does this Presenter demonstrate an overall professional demeanor? YES NO
General Comments

Peer Review

Presenter/Facilitator:

Reviewer:

Note to Reviewer: Please remember to speak from only your point of view. What did the presenter do that had an impact, positive or negative, on you.

What you do that is effective

What you could do that would make you even more effective

Peer Review

Presenter/Facilitator:

Reviewer:

Note to Reviewer: Please remember to speak from only your point of view. What did the presenter do that had an impact, positive or negative, on you.

What you do that is effective

What you could do that would make you even more effective

APPENDIX II: VOLUNTEER REGISTRATION

Memorandum

To: Alpha Phi Omega Volunteers
From: Bob London, Executive Director
Date: 3/21/03
Re: Volunteer Registration

The Board of Director's Policy Manual states that all elected and appointed volunteers at the Sectional, Regional, and National levels must complete a volunteer registration form as provided by the National Office. These forms are to be received and kept on file at the National Office. The form will be valid as long as the volunteer is in the position listed.

- A volunteer only needs to provide the form and sign the Risk Management Policy once.
- The form can be e-mailed, faxed, or mailed to the National Office; however the Risk Management Policy must have a signature.
- We will send out lists of those who have registered to Sectional, Regional and Program Directors to verify that all volunteers have complied with this policy.
- These forms will be made available on the Fraternity's website so all future Volunteers can register within 20 days of their appointment.
- A database containing this information will be maintained at the National Office.

**Statement of Purpose
for the
Policy of Risk Management**
Alpha Phi Omega National Service Fraternity

Alpha Phi Omega, National Service Fraternity is dedicated to a quality fraternity experience and therefore urges brothers and chapters to adopt and implement a comprehensive risk management policy.

Risk Management, a phrase that has never been heard by most of the older generation, is rapidly becoming the common term in campus and chapter conversations. Risk Management is just plain responsible behavior. It is the willingness of Alpha Phi Omega members to provide a safe fraternal environment, taking care of one another, taking care of our guests, planning carefully all aspects of our programs, abiding by the laws of our fraternity, our campus, our community and our nation. Simply put, it is the basic respect for our fraternity, people, property, and laws.

Brotherhood, human dignity and respect serve as the foundation of Risk Management. As we plan our activities we should be aware of this at all times. Risk Management means taking a few extra precautions, being more imaginative when planning events, and preparing for the well being of everyone.

In matters of this fraternity, all actions taken by our members must adhere to the standards of conduct, which our community demands. Individuals are required to act in a manner as a reasonable person of ordinary prudence would act under similar circumstance. As a general rule, it is useful to ask yourself two questions when concerned about liability and safety. **One** - Is it possible that, given the arrangements we have for this event, some injury may result? **Two** - Did we do all that a reasonable person would deem appropriate to avoid accidents? More often than not, when organizations sponsor events, the answers to these two questions are incriminating.

Alpha Phi Omega members must abide by the:

1. The laws of our nation;
2. The laws of the state in which they reside;
3. The local laws of the municipalities they operate within;
4. The rules and regulations of the sanctioning educational institute they operate in; and
5. The rules and regulations of this fraternity.

Alpha Phi Omega has established guidelines previously that serve as a starting point for Risk Management Policies

- Membership Policies Statement;
 - National / Convention Alcohol Policy; and
 - Bylaws pertaining to Hazing and Housing

A comprehensive Risk Management Policy shall also include, but not be limited to, standards addressing:

- Drugs / Substance Abuse
- Sexual Abuse / Harassment / Discrimination
 - Individuals with Disabilities
- Contractual / Financial Issues
- Transportation Issues
- Advisors
 - General Health and Safety
 - Personal Property
 - Risk Management Education

**The Standard Policy
of
Risk Management
Alpha Phi Omega
National Service Fraternity**

HAZING

No fraternity member shall take part in hazing activities. Hazing activities are defined as (but not limited to):

Any action taken or situation created, intentionally, whether on or off fraternity premises or during fraternity functions, to produce mental or physical discomfort, embarrassment, harassment, or ridicule. Such activities may include but are not limited to the following: use of alcoholic beverages; paddling in any form; branding; creation of excessive fatigue, physical or psychological shocks; quests; treasure hunts; scavenger hunts, road trips; or any other such activities carried on in the name of the fraternity; wearing of public apparel which is conspicuous and not normally in good taste; engaging in public stunts and buffoonery; morally degrading or humiliating games and activities; and any other activities which are not consistent with fraternal law, ritual or policy or the regulations and policies of the educational institution and local, state and federal laws.

SEXUAL HARASSMENT / ABUSE / DISCRIMINATION

The fraternity will not tolerate or condone any form of abusive or discriminatory behavior on the part of its members, whether physical, mental or emotional in respect to sex, race, ethnicity, physical or emotional handicap, age, marital status or sexual preference. This is to include any actions, which are deemed to be demeaning to all but not limited to date/gang rape or verbal harassment.

CONTRACTUAL and FINANCIAL ISSUES

No chapter, alumni association, section, or region shall enter into a contract or financial agreements using the specific name of Alpha Phi Omega. Qualifying statements as to which chapter, alumni association, section, or region must accompany all agreements entered into for the purposes of supporting fraternity functions. This includes, but is not limited to, such agreements as leases, contracts, hold harmless agreements, liability releases, account agreements, purchase orders, and hotel or banquet contracts.

ALCOHOL and DRUGS (SUBSTANCE ABUSE)

The possession, use and/or consumption of Alcoholic Beverages, during any fraternity event, any event that an observer would associate with the fraternity, or in any situation sponsored or endorsed by the chapter, must be in compliance with any and all applicable laws, policies and regulations of the state, county, city and institution of higher education. The unlawful possession, sale and/or use of any illegal drugs or controlled substances at any fraternity sponsored event, or at any event that an observer would associate with the fraternity, is strictly prohibited. Chapters, Interest Groups and Petitioning Groups of Alpha Phi Omega National Service Fraternity shall not use or condone the use of alcoholic beverages as part of their membership recruitment “rush” or pledge education programs. A violation of this policy shall be deemed a violation of the membership policies of Alpha Phi Omega National Service Fraternity.

PERSONAL PROPERTY

Use of personal property in fraternity activities shall be strictly voluntary and the sole responsibility of the owner. Alpha Phi Omega shall not assume liability for personal property used in conjunction with fraternity activities, nor for any damages resulting from said use.

TRANSPORTATION ISSUES

Any individual who drives or otherwise provides transportation in conjunction with Alpha Phi Omega activities shall obey all applicable motor vehicle laws, including, but not limited to, those concerning vehicle safety, vehicle operation, insurance, and the transportation and consumption of alcoholic beverages. Operators will ensure that vehicles are not overloaded and are driven in a safe manner. Rental vehicles shall be operated in accordance with rental contracts. Use of personal vehicles shall be strictly voluntary and the sole responsibility of the vehicle owner/operator. Alpha Phi Omega shall not assume liability for personal vehicles used in conjunction with fraternity activities, nor for any damages resulting from said use.

GENERAL HEALTH AND SAFETY

All activities planned in conjunction with Alpha Phi Omega shall take into account the health and safety of all participants. Planning of Alpha Phi Omega projects and activities will include appropriate personal safety equipment (ear plugs, eye protection, gloves, etc.), training (use of tools and equipment), and supervision. All equipment to be used in conjunction with Alpha Phi Omega activities will be in good working condition and will be used in a safe manner.

ADVISORS

Advisors and alumni serving Alpha Phi Omega on behalf of their employer or respective volunteer agency (educational institution, youth service organization, etc.) will do so in accordance with the policies of said entity, including but not limited to risk management and personal liability. Advisors and alumni shall adhere to the provisions of this and all applicable policies of the fraternity when engaging in fraternity-related activities. Advisors and alumni shall recognize the appropriate authority of elected or appointed officers, representatives or employees of the fraternity in questions of policy and shall not engage in activities designed to circumvent fraternity policies.

EDUCATION

All reasonable efforts will be made to insure each student member, pledge, associate member, advisor, alumnus, and honorary member shall be instructed on the Risk Management Policies annually. Active Chapters, alumni associations, and sectional, regional, and national volunteers will indicate their understanding of and compliance with the Risk Management Policy statement on an annual basis. Organizers of fraternity events will reasonably inform guests (including non-members, alumni, advisors and visiting members) of applicable policies.

VOLUNTEER REGISTRATION FORM

Name:

Initiating Chapter:

National Initiation Number: Region: Section:

Primary Volunteer Role:

Name of Your Committee/Region/Section Chair:

Address:

City/State/Zip:

Phone Number:

E-Mail:

Affirmation of Compliance with Risk Management Policies

Alpha Phi Omega places a high value on the dignity and worth of a human being. Therefore, I, the undersigned, have read the Risk Management Policies of Alpha Phi Omega. I hereby affirm my acknowledgment of these Risk Management Policies and its recognition that noncompliance of any of these policies has no place in Alpha Phi Omega.

Signature

Printed Signature

Date

Please Return this page to Alpha Phi Omega National Office:
E-mail: executive.director@apo.org Fax: 816 373-5975 Mail: 14901 E. 42 Street, Independence, MO 64055

APPENDIX III: COMMITMENT FORM

This contact information will be added to the National Database of APO LEADS presenters. Also the e-mail address listed will be subscribed to a mailing list so you may be notified of course requests.

National Member #:

Name (include former name if different when joined):

Address:

E-mail:

Telephone:

Chapter at which you became a Brother:

This is a commitment to continue improving your presentation skills specifically in the context of the APO LEADS program and a commitment to improving the leadership skills of our active membership by presenting these courses. At this time, we would like you to reflect upon your own evaluation of your skills, your motivation and aspirations from participation in APO LEADS. Responses will be for the Trainers only. Thank you!!!

I will present my first **APO LEADS** course for observation by: (if training received for more than one course please list all with date)

Within the next semester I would like to present/facilitate

' Launch ' Explore ' Achieve ' Discover ' Serve

Within the next year I would like to present/facilitate

' Launch ' Explore ' Achieve ' Discover ' Serve

I plan to eventually become a Director in

' Launch ' Explore ' Achieve ' Discover ' Serve

I am willing to work toward the following roles:

- Observer/Trainer for _____
- Course Training Coordinator for: _____
- Course Coordinator for _____
- Revision Coordinator
- Presenter Development Coordinator
- Curriculum Evaluation Coordinator
- Another role in the LD program, please specify _____

How did you find out about this training?

What aspect of this training appealed to you personally?

What are your strongest skills as a presenter and facilitator?

What do you consider to be your weakest skills as a presenter and facilitator?

What do you consider to be the area in which you would like to most improve?

At this time, are you available to travel at least one weekend a year to give a course outside your home area?

Please share any ideas you have for the future development of the LD program.

By my signature I, _____ (name), make the commitment to the **APO LEADS** program and Alpha Phi Omega's Leadership Development Program at large to present the courses listed by the specified dates, to work to develop the skills listed, to learn new skills, to remain willing to travel, to continue to present one of each course for which I am certified once per year, and to adhere to the presenter responsibilities described in this guide.

Signature _____ Date _____