THE ADULT VOLUNTEER INSTRUCTORS' RITE OF INITIATION: TRAINING AS A SOCIALIZATION PROCESS

by

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(ABSTRACT)

Adult volunteer instructor training is an important transaction in the dissemination of community health courses to citizens in schools, worksites, religious organizations, and recreational centers. Yet prior to this study little was known about this process by which an individual was transformed from a willing volunteer into a volunteer instructor.

Questions about what occurred during training and how the participants changed were examined through qualitative case studies. The training event was sponsored by a local unit of a large national nonprofit organization which extensively uses volunteer instructors to teach community educational courses. Participant interviews, before and after training, as well as observations of behaviors, language usage, and attitudes during training, were completed. The method of constant comparison was used to analyze the data for patterns of similarity and dissimilarity.

The problem studied was: what was the training process

through which volunteer instructor candidates are socialized into their roles as instructors and how does the process work? To understand this problem, the instructor candidates' (ICs') pre-training characteristics and the ICs' and trainer's responses during training were examined.

Principal findings were: (a) most ICs expected a certification process, not a socialization process, that changed their existing skills; (b) the trainer expected a socialization process that changed ICs' skills, knowledge, and attitudes; (c) a pattern was found between ICs' pre-training characteristics and their conformity during training; (d) language did not function as a facilitator of socialization; and (e) the trainer's structure and conduct of training inhibited the socialization process. From these findings, conclusions were drawn about pre-training characteristics that predisposed cooperation or difficulty during training and the trainer's ability to lead a training conducive to needs of adult learners and for socialization.

This qualitative study offered insights into the ICs' consistencies and changes during training and the conduct of training to meet the needs of adult learners. Based on the study's findings, recommendations for improving this particular training course and future research considerations in socialization, adult education, and voluntarism were made.

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CHAPTER 1

INTRODUCTION

Voluntarism in its many forms and faces is pervasive in American life. Voluntary initiatives through nonprofit organizations touch our lives in basic to extraordinary ways--from health to nuclear nonproliferation. Voluntary organizations, through volunteer instructors, intimately interact with the public on a wide spectrum of issues through the transfer of knowledge, skills, and attitudes. Community health courses offer one of the most evident, continuous imprints of voluntary nonprofits in American life.

Adult volunteer instructor training is a very important transaction in the dissemination of community health courses to citizens in schools, worksites, religious organizations, and recreation centers. Yet little is known about the factors by which an individual is transformed from a willing volunteer into a volunteer instructor.

This study probed into the process of the socialization of volunteer instructor training in one of America's predominant volunteer organizations. It focused on a major voluntary organization through which the largest number of volunteer instructors are prepared to teach community health education courses in the USA and abroad. It is not only the largest single purveyor of volunteer instructor training, but it also serves as a model for

instructor training in other voluntary organizations (Bachman, personal communication, 1988).

Background of the Problem

Effective training can be a planned, prescribed, and empowering transaction to transfer knowledge, skills, and attitudes from an organization to an operative individual or group (Bachman, personal communication, 1988; Bryce, personal communication, 1988; Merton, personal communication, 1987). Unions, corporations, religions, political parties, professional associations, and other less formal groups implement training. In the public and private sectors, the type of training that develops knowledge, job skills, and attitudes, while orienting workers to the organizational culture, is referred to and examined as a socialization process (Baltes & Schaie, 1973, p. 56; Hoffer, 1970, p. 335; Sredl & Rothwell, 1986, p. 197). Many authors reflect the serious scrutiny and understanding of socialization in public and private sectors.

One vital sector in society where the effects of socialization through training have escaped scrutiny, understanding, and oversight is the voluntary sector. Yet the voluntary sector trains volunteer instructors for vital representational and instructional roles in community health education. Lack of understanding about adult

volunteer instructor training should not continue to be accepted because the voluntary sector possesses large resources, engages numerous instructors, and impacts on nearly every facet of American life--from a distinct, but analogous, position similar to corporations, government, unions, and families. Voluntary instructors are the gatekeepers and purveyors of instructional and training commodities vital to successful negotiation of daily life for many people. These voluntary instructors are role models and disseminators for the values and beliefs of the organization that they represent--through which they were "socialized"--and our broader society.

Voluntary Organizations' Health Courses

Through the educational courses offered by voluntary organizations, millions of Americans learn about health promotion, health maintenance, health education, and health care. Voluntary organizations serve a major function in disease and accident prevention and lifestyle education in the United States (Connors, 1980, pp. xii-1) through programs like swimming lessons, anti-smoking campaigns, and high blood pressure courses. The goal of these community health courses is to help adults acquire and apply information, skills, behaviors, and attitudes so that they can make informed decisions and act upon them (Ewles & Simnett, 1985, pp. 22-32).

Two types of voluntary organizations teach health education courses: (a) organizations wherein their primary mission is health education and (b) organizations wherein teaching community courses is often one activity within the goal of human services or youth development. The voluntary organization with the primary mission to teach health education is classified as a voluntary health organization (Lierman, 1980, p. 50). The American Heart Association, March of Dimes, and the American Cancer Society exemplify this type.

The second type of voluntary human and social service organization teaches community education courses to fulfill a larger social mission, such as youth development, disaster relief, or economic development. The Boy Scouts of America, Girl Scouts of the U.S.A., American Red Cross, and Association of Junior Leagues exemplify this type. Social service organizations' members are trained as instructors for courses by the voluntary health organizations. For example, Junior League members, Boy Scouts, and Girl Scout leaders are trained in disease prevention and health promotion by the American Red Cross (Morrill, personal communication, 1988; Merton, personal communication, 1987; Hussey, personal communication, 1987).

The pervasiveness and amount of resources that the American public entrusts to voluntary organizations for

community instruction are staggering. The American Red Cross is the voluntary organization with the largest number of courses and volunteer instructors teaching courses--under its own and others' auspices (ARC, 1987, p.34). In 1987, over 500 thousand volunteer instructors taught 7.1 million people First Aid, Cardiopulmonary Resuscitation (CPR), home nursing/home health aid, swimming, lifeguarding, high blood pressure management, and nutrition courses (ARC Annual a Report, 1987, pp. 23, 25, 35). In 1987 the Red Cross spent 66 million dollars to deliver its health courses--nationwide and through military installations overseas (ARC, Annual Report, 1987, p. 34).

Instructor Training

The effectiveness of voluntary organizations in reaching their health education missions and accomplishing their objectives is dependent upon the effectiveness of the volunteer instructor (Plambeck, personal communication, 1987; Silva, personal communication, 1987). Volunteers who teach community health courses are recruited from civic groups, religious organizations, commerce and industry, unions, high schools and colleges, and community based agencies.

Most volunteer instructor candidates (ICs) are at least eighteen years old. They are a subset of the total volunteer population. Volunteers are described as

independent, nonconforming, and enthusiastic. They reportedly volunteer because they want to help others, to have new experiences, to be in charge, and to feel good about themselves (Confer, 1981; Jenner, 1981; Pearce, 1978; Schindler-Rainman, 1986; Schram, 1986; and Trabert, 1986).

Volunteers choose to be ICs from a variety of possible volunteer assignments. They do not necessarily know anything about the course to which they aspire to teach, except perhaps by virtue of having taken the basic level course and succeeded in the basic subject matter. Volunteers bring into training varied knowledge, skills, and attitudes that need to be translated from their previous background into the specific culture of the recruiting voluntary organization (Rauch, 1972, pp.1-7).

Voluntary organizations rely on the instructor training courses to teach the basic skills, knowledge, and attitudes needed to train any instructor (Bachman, personal communication, 1988; Cale, personal communication, 1988). Considerable attention is given to training volunteers to assume job responsibilities. Prescriptive information and how-to books about volunteer training are numerous (Boy Scouts of America, 1987; Center For Volunteer Development, 1986; Janey, 1985; Lauffer & Gorodezsky, 1977; Schindler-Rainman & Lippitt, 1975; Stenzel & Feeney, 1976).

Descriptions of training in the voluntary and adult

education literature depict training as an institutional mechanism to teach and evaluate skills. Its purpose is to change knowledge, skills, and attitudes of participants (Lauffer & Gorodezskey, 1977, p.49; Stenzel & Feeney, 1976, p. 18; Wilson, 1984, p. 142). Training is defined as "a body of knowledge and values that all volunteers need to understand, accept, and practice regarding the type of activity he or she will do" (Stenzel & Feeney, 1976, p. 18).

During interviews, the training directors of the American Cancer Society, American Heart Association, American Red Cross (ARC), Association of Junior Leagues, Boy Scouts of America, Camp Fire, Inc., Girl Scouts of the U.S.A., March of Dimes, and Young Mens Christian Association (YMCA) consistently defined instructor training as a way to teach volunteers the knowledge and skills relevant to the course content, as well as information about the organization's history, present priorities, future direction, record keeping, and reporting requirements.

The effectiveness of instructor training courses in preparing volunteers for their role as instructors has not been systematically investigated. Training directors report that evaluations ascertaining what instructor candidates liked or disliked in training are periodically completed. Yet rarely is a detailed process or outcome evaluation completed (Bachman, personal communication, 1988; Diener,

personal communication, 1988).

Expert opinion and documentary sources indicate that something may be missing from the volunteer instructor training courses to produce critical information consistency, communication skills, and loyalty to the organization. These knowledge, skills, and attitudes are found lacking in many volunteer instructors (Asche, personal communication, 1987; Evans, personal communication, 1988; Plambeck, personal communication, 1987).

Jane Asche, a staff member at the Virginia Polytechnic Institute and State University's Center for Volunteer Development, stated that two areas of instructor competencies--the ability to involve participants in the learning process and to resolve conflict--are inadequately developed in voluntary organizations' instructor training courses (Asche, personal communication, 1987). Don Plambeck, a nonprofit training consultant, stated that training of instructors in many organizations is inconsistent and the quality of the training often depends on the individual trainer (Plambeck, personal communication, 1987). Debra Evans (personal communication, 1988), director of a large volunteer instructor unit, stated that she has "over a hundred volunteers certified, but only a handful teach. And some of those who teach don't teach as the course is written."

There is evidence that more people are trained as instructors than actually teach a course (Showronek, personal communication, 1988; Cale, personal communication, 1988). In the Red Cross approximately 33% of instructors who complete a course to be a volunteer instructor, actually teach a course of record (Silva, personal communication, 1987; Sonenstein, 1987, p. 37). Is something within the instructor candidate training preparation and rite of initiation absent, or not well understood that might relate to instructors' competencies and commitment to perform as a community instructor after the training? Is socialization missing?

Training as a Socialization Process

Volunteer instructor training examined as a socialization process provided a more significant understanding of training. Insights from the study can be used to better understand, eliminate, or utilize the organizational and volunteer resources involved in training. Training is explained as a socialization process (Adams, 1980, p.99; Hoffer, p. 335; Sredl & Rothwell, 1986, p. 198; Stenzel & Feeney, 1976, p. 18). Hoffer wrote that training in voluntary organizations is a means to another goal, such as better health or socialization (Hoffer, 1970, p. 335).

Socialization is "the process by which actors are made willing to conform to norms and are given the interpersonal

and other skills necessary for playing roles thereby willing to conform to norms and are given the interpersonal skills necessary for playing roles" (Turner, 1982, p. 48). The operational definition of socialization used in this study was based on the assumption that volunteers have a peripheral attachment--by nature of being a volunteer--to the voluntary organization.

This study examined how a training event prepared individuals for their socialized roles as volunteer instructors. This research examined the ICs' development of socialized characteristics such as (a) role understanding (Baltes & Schaie, 1973, p. 56; Sredl & Rothwell, 1986, p. 197); (b) organizationally desirable characteristics (Adams, 1983, p.35) and (c) commitment to the organization (Jenner, 1981, p. 23). The "role" studied was the volunteer instructor. The "organizationally desired characteristics" were the ability to perform instruction as a representative of the voluntary organization and being committed to the organization.

The nature of the training environment was examined for impediments or expediters of socialization. Training cues for people to judge adequate and inadequate behavior (Tannenbaum and McLeod, 1983, p. 29; Goslin, 1968, p. 18; Moore, 1981, p. 808) were assessed. Ondrack (1975, pp. 97-98) wrote that cues, signals and messages, which allow

people to judge acceptable and unacceptable behavior are essential for learning social roles. Language--technical terms, acronyms, jargon, and special emphases--used during training was assessed.

The structure and conduct of training thought to affect the socialization process was studied. Adult educators emphasize the importance of the training environment to meet the needs of the adult participants (Brookfield, 1986; Chalofsky & Lincoln, 1987; Lean, 1984, Schindler-Rainman, 1986; Wlodkowski, 1985). Wilson (1976, pp. 143-144) wrote that training sessions of volunteers should be based on Knowles'(1984) andragogical model of adult learning. Training was examined for Knowles' (1984, pp. 55-59) andragogical assumptions about training adults. Training was examined for the socialized components of the participants' characteristics, use of language, and nature of training.

Socialization Concepts and Voluntary Organizations

Concepts of the socialization process, role expectations (Ellsworth, 1962; Adams, 1980) and organizationally desirable characteristics (Adams, 1980), Dailey, 1986; Jenner, 1981), have been singularly studied in voluntary organizations. Optimal characteristics for training volunteers were proposed (Chalofsky & Lincoln, 1983, p. 29; Lean, 1984, pp. 20-25; Stenzel & Feeney, 1976,

p. 185; Wilson, 1984, p.50). Together, these studies offered a foundation for this study of the socialization of volunteer instructors. They documented the existence and variability of components of socialization in voluntary organizations. But they did not indicate how these components interact during socialization for a voluntary organization.

Role expectations in voluntary organizations were examined by Adams (1983) and Ellsworth (1962). Ellsworth (1962, p. 887) found that volunteers in YMCA were less clear about their role expectations than the paid staff. Adams found that the prescribed role for volunteer instructors in the Red Cross was an obedient, dependable, and docile role. He wrote that (a) volunteers needed training in work skills and organizational norms to perform their role in the organization and (b) socialization was the means of acquiring organizationally desirable behavior (Adams, 1983, p. 35).

Characteristics of organizational commitment to voluntary organizations were identified in Dailey's (1986, pp. 18-29) study of voluntary fund raisers and Jenner's (1981, pp. 23-24) study of volunteers in a women's organization. Both Dailey and Jenner defined organizational commitment as a) the willingness to remain a part of the organization, b) willingness to exert high levels of effort

on behalf of the organization, and c) strong belief and acceptance of values of the organization (Jenner, 1981, p. 23; Dailey, 1986, p. 20).

These factors of role expectation, organizationally desirable characteristics, and organizational commitment were expected to be a part of a training event which socializes volunteer instructors. Rewards and sanctions which are cues to allow participants to emulate and judge appropriate behavior were expected to be in the training of volunteer instructor candidates. Pearce's (1978, p. 203) comparative study of volunteer and paid staff organizations revealed that rewards and sanctions to reinforce organizational norms for volunteers were different than those of paid staff. Volunteer rewards were personal pride and recognition, social interaction, and a sense of contributing to the community. Sanctions applied to volunteers were humiliation, deprivation of support or social opportunities, and harassment. Paid staff rewards were salary, benefits, and promotions and sanctions were dismissal and demotions.

A training of volunteers which is a socialization process was expected to contain cues to judge or reinforce appropriate behaviors and organizationally desirable characteristics. This study will examine volunteers' progress through a training event to gain an understanding

of the volunteers' socialization process and the training event.

Statement of the Problem

The problem studied was: what was the training process through which volunteer instructor candidates were socialized into their roles as instructors and how did this process work?

To guide the collection and analysis of data, the following research questions were posed:

1. How did the ICs' expectations for growth interact with the trainer's expectations over time?

(a) How did adjustments in expectations occur; what kind of resistance to change in expectations occurred?

(b) How did the trainer adjust the training to respond to the interaction caused by different expectations among the ICs?

2. How did the ICs with varying perceptions of their skill level before training, change in skill levels, change in expectations, and change in attitudes over time?

3. How did language function as a mediator of socialization?

4. How did the trainer's structure and conduct of training hinder or facilitate the socialization process?

Significance of the Study

This study's conceptualization of training as a

socialization process provided insights to understand the practice of training in voluntary organizations as the means to prepare individuals as instructors and organizational representatives, as well as contributing to existing bodies of knowledge about adult education, voluntary organization, and socialization.

This study extended the knowledge of the socialization process by applying its principles to a training process in the voluntary nonprofit sector. The field of adult education gained a description and analysis of its practice in a voluntary setting.

This study can serve as a basis for future studies in the same organization or other national voluntary nonprofit organizations, to help shape understanding of the practice of training instructors. The research design can be adapted for other studies which examine training courses in voluntary nonprofit organizations.

The study provided descriptive insights into the ICs' training process. Suggestions for areas to improve efficiency and effectiveness of instructor recruitment, training, and productivity were made.

Limitations of the Study

The findings for this study cannot be generalized to other voluntary organizations or courses in the same voluntary organization. The case studies were not randomly

selected.

Definition of Terms

For the purpose of this study, the following definition of terms provided the standard of meaning.

1. Community courses: Courses sponsored by voluntary organizations and taught to the general public. Community courses are courses taught at a location other than the volunteer instructor's place of employment. Examples of such courses are: Cardiopulmonary Resuscitation (CPR) by the American Heart Association; First Aid by the American Rescue Organization; and Special Touch by the American Cancer Society.

2. Emergency Association (EA): The name given to the voluntary organization sponsoring the first aid instructors course in this study. The name was changed to preserve, as promised, the anonymity of the sponsoring organization and persons involved.

3. Instructor: A certified leader who is authorized to conduct a learning activity designed to help participants acquire information, skills, and attitudes in a particular content area.

4. Instructor candidate (IC): A person who is taking a training course to become an instructor.

5. Organizational commitment: The willingness to teach an EA course according to organizational guidelines, to be identified as an EA instructor, and to invest in EA

social activities.

6. Role: The prescribed behavior for a person performing a specific task in a social organization.

7. Socialization: The process whereby individuals are encouraged to invest motivational energy in roles that require conformity to norms and wherein these individuals are given interpersonal and other skills necessary for successfully fulfilling the roles.

8. Trainer: A person certified and authorized to teach a course to certify instructor candidates as instructors.

9. Training: A specific kind of teaching and instruction in which the goals are clearly defined, are usually readily demonstrated, and call for a degree of mastery which requires student practice and performance, teacher guidance and appraisal of the student's performance capabilities, and often certification of successful completion.

10. Volunteer: A person contributing services without pay to a specialized program or organization.

11. Volunteer instructor: A person who freely chooses to teach and receives no monetary reimbursement for instructional activity.

12. Voluntary organization: An organization in which the majority of the workforce are volunteers.

Organization of the Study

Chapter I is the introductory section. It includes background information on the problem, statement of the problem, significance of the study, definition of terms, limitations of the study, and overview of the organization of the study.

Chapter II presents the review of the literature. A brief description of the author's approach to and findings from the literature review and expert interviews is provided. This is followed by background information sources and pertinent literature citations that lead to a framework and concepts underlying the research design and implementation strategy.

Chapter III presents the research design and sequence for implementation. The research design, data collection instruments, implementation strategy, and data analyses processes are included.

Chapter IV presents descriptions of the training process and case studies. It provides a description of the training event, officials, and ICs' case studies.

Chapters V through VIII present the results from the study. Chapter IX presents the analyses of the results found in previous chapters.

Chapter X presents a summary of the research and the principal findings. Conclusions and recommendations for

improving the first aid instructors course and future research are provided.

CHAPTER 2

REVIEW OF THE LITERATURE AND SELECT INTERVIEWS

The training of adult volunteer instructors as a professional practice area of adult education did not reflect an understanding of the socialization dynamics within voluntary organizations. A clear framework helped to identify fundamental transactions pertaining to organizational and instructional objectives that were proposed by the organization, implemented by the trainer, and received and made operative by adult learners, who were volunteer instructor candidates.

The present review of literature and select expert interviews related to theories and recent studies about the training of adult volunteer instructors. The study of adult volunteer instructor training was derived from three principal fields of literature and experience, and a subset within each category: (a) voluntary organizations literature and the subset volunteers; (b) adult education literature and the subset instructor training; and (c) socialization literature and the subset training as a socialization process.

Voluntary Organizations

Voluntary organizations are usually nonprofit organizations--their primary purpose is not to make a profit--and the majority of their workforce are volunteers. They are distinct from profit making organizations (private sector) and from governmental organizations (public sector)

by virtue of their distinct legal, fiscal, governance, personnel, and accountability features in American society. As members of the "third sector" in American society, voluntary organizations have primary purposes to provide resources, programs, services, and products for the public good without dedication to financial profit making, nor to function as an extension of any jurisdictional government (Bryce, 1987, pp. 1-15).

Volunteer organizations have a distinct legal status and fiscal status, usually enjoying special exclusionary rules under the Federal Internal Revenue Service code and procedures. Voluntary nonprofit organizations acquire operational and endowment revenue from personal and corporate donations, corporate and philanthropic grants, governmental and non-governmental contracts, and revenue generating programs, services, and products that directly contribute to their purpose and current goals (Bryce, personal communication,1988).

Voluntary nonprofit organizations exist for education, welfare, social service, cultural activity, community service, and other philanthropic pursuits. As economic enterprises, however, voluntary nonprofit organizations comprise the third largest sector of American productivity and economic enterprise, after the private and public sectors (Bryce, 1987, pp. 1-15).

One of the notable differences among these sectors is a uniqueness in organizational culture within the voluntary organization. The voluntary culture is supportive of serving its members and broad societal goals (O'Connell, 1985, pp. 1-4). Voluntary organizations provide opportunities for friendship, recreation, social status, self-help, and growth for their members and consumers (Mason, 1984, p. 1).

Public policy, economic, sociological, and organizational development studies are focusing on the interdependence among and between the so-called sectors in American society. The sectors are connected through shared manpower, financial resources, social reform ventures, and agendas for higher quality of life. Volunteers are often paid employees in the private and public sectors which periodically join forces to address mutually agreed upon enterprises for the general welfare, e.g. drug abuse prevention, illiteracy, and community economic development (O'Connell, 1985, pp. 1-8; Pearce, 1982, pp. 390-394).

In a study comparing similar jobs in agencies engaging volunteer staff and paid staff, Pearce (1978, pp. 200-207) found that roles and responsibilities in paid and volunteer jobs were similar, but the type of contracts and rewards differed. She concluded that volunteers received more praise for their work and thought their work to be more

socially significant than the work of paid employees. Both types of workers, paid and volunteer staff, had contracts. The contract specified the norms and procedures that were mutually accepted by the organization and its workers. Volunteer contracts were less clear and more informal than paid staff contracts.

Voluntary organizations are classified and described according to the type of control system by which they operate. Etzioni (1975, p. 19) classified voluntary organizations as normative organizations which use moral controls to influence their members. An example of a normative control is the use of morality based or social ethic oriented persuasion to influence and control volunteers (Mason, 1984, p. 60-65; Pearce, 1983, pp. 23-24; Wilson, 1984, p. 50).

Pearce (1978, p. 203) explained that the types of controls and sanctions used in coercive, utilitarian, and normative organizations were used in voluntary organizations. She wrote that coercive controls (sanctions) and reward controls (benefits), as well as the normative control of persuasion, were practiced in voluntary organizations. Volunteers were controlled by humiliation, lack of support, denial of social opportunities, or harassment.

Exchange theory is used to explain participation in

voluntary organizations. Schram (1986, pp. 14-20) wrote that volunteers exchange tangible benefits for intangible benefits. Volunteers give their time, money, and expertise for the intangible benefits of enriching the quality of life, a sense of well being, clear conscience, camaraderie, recreation, recognition, and honor. Volunteers receive for their labors the knowledge that they did something worthwhile and the thrill of personal accomplishment and recognition (Pearce, 1978, p. 203).

The special features of a voluntary organization attract and activate people who freely choose to represent and work for the unique enterprise: volunteers. These people merited scrutiny in the voluntary organizational setting.

Volunteers

The personnel dimension is different in voluntary organizations than other sectors. In voluntary organizations there are more volunteers than paid staff working on behalf of the organization. The volunteer - paid staff ratios range from organizations entirely staffed by volunteers to large national organizations like the American Red Cross which reports a ratio of 61 to 1 volunteers to paid staff (ARC, 1986, p. 25).

Profiling characteristics of volunteer workers is a major focus in the literature about volunteers. Surveys

report volunteers are independent, nonconformist, male, female, medium to upper income, educated, employed, retired, transitional workers, young, old, and middle age (Dailey, 1986, pp. 21-23; O'Connell, 1985, p. 3). With this range of characteristics, it is not surprising that a Gallup survey found 47% of the American adults were active volunteers (O'Connell, 1985, p. 3).

Volunteers do not receive monetary reimbursement for their activities. People usually volunteer part-time, at tasks they chose. Volunteers have diverse backgrounds, want to help others, and want to be in charge (Schram, 1986, p. 25). They have different motives, benefits, and accountabilities from employed workers. Volunteering is an avocation (Rauch, 1982, p. 94; Stenzel & Feeney, 1976, pp. 1-18).

Motivational theories of altruism, utility, human capital, exchange, and expectancy have been used to explain why people volunteer. With the exception of the altruistic theory, these theories propose that volunteers are motivated for something in return. Research has not presented one sole explanation as the reason why people volunteer. Most authors think several motives interact to initiate and sustain volunteer behavior (Schram, 1986, p. 25).

Adams' (1980, pp. 98-100) study about Red Cross disaster volunteers found motives that were consistent with

the 1974 American Volunteer Action Survey. The type of motives and reasons volunteers gave were: 31% reported an altruistic motive: it did others or myself some good; 23% stated an intrinsic motive: it was fun; 23% gave a negative motive: couldn't give a reason why not; and 10% reported other motives: a variety of practical and personal goals.

People volunteer to gain self-esteem, new business, civic or cultural contacts, and skills and knowledge which are transferable to different settings. They volunteer for religious reasons, to help other people, especially a child, relative, or friend, and they enjoy volunteering in a job that is worthwhile and interesting (Schram, 1986, p. 23; Schindler-Rainman, 1986, p. 129). Positive relationships with subordinates and superiors and opportunities for growth and responsibility in the job are reasons to continue to volunteer (Confer, 1981, p. 71).

Organizational characteristics are factors in continued commitment, sustaining the volunteer's activity. A study of 138 fund raisers for a major voluntary organization measured work attitudes and job characteristics as factors of organizational commitment. Job satisfaction, work autonomy, and feedback from workers were strong predictors of organizational commitment. Job characteristics were more important than personal characteristics in explaining commitment (Dailey, 1986, p. 29).

Contracts, an organizational characteristic, were compared in 14 profit and voluntary organization. Voluntary organizations with the greatest retention had the most elaborate procedures to reduce contract ambiguity. Notebooks with written policies, formal job descriptions, activity manuals, and systematic training programs were ways to reduce contract ambiguity (Pearce, 1978, pp. 207-209).

Other studies concluded that social factors, combined with organizational characteristics and personal goals, influenced volunteer commitment. A study of Cooperative Extension Service volunteers found that the organizational climate's components of task clarity, open communications, and opportunities for personal development were predictors of organizational commitment (Telep, 1986, p. 1884). A sample of YWCA volunteers reported that the nature of the job, acceptance of the job by associates, as well as opportunities for attaining personal, social, occupational, and religious goals were related to job satisfaction (Almanzor, 1961, p. 349). A study in a voluntary women's organization found the most influential variable of continued loyalty was the opportunity to interact with peers (Jenner, 1981, pp. 355-356). A comparison of volunteers in a literacy tutoring program reported acceptance and equality by paid staff, recognition, and the ability to interact with other volunteers were factors positively related to

continuing to volunteer (Rodriquez, 1983, pp. 2-3).

The volunteer task initially attracts a person to volunteer and often affects continued commitment. Volunteer tasks, when defined as roles, connect volunteers with the organizational purpose and other participants whose roles depend on each other (Adams, 1980, pp. 102-106; Ellsworth, 1962, pp. 100-114). Describing a volunteer job as a volunteer role imparts a sense of dignity to it (Stenzel & Feeney, 1976, p.37).

A volunteer role is a job with skills, knowledge and expectations about how to perform that job. The roles are clerical, transporting, teaching, literary, publicizing, marketing, planning, managing, financing, and caring for children, elderly, sick, and handicapped. For each role, there are expectations about how to do the job and to behave, according to the voluntary organization's standards.

Two research studies about role analysis were completed in the American Red Cross and the YMCA. Adams' (1980, pp. 102-106) study of Red Cross disaster volunteers found different role expectations for different types of volunteers. The elite volunteers, board members, had less limitations in their roles and were expected to assume tasks without being instructed. Lower volunteers, providing direct service, were instructed to stay within the boundaries of their role and to do only the assigned task.

Elite participants were encouraged to make decisions to change policy, while lower participants were discouraged from changing the organization. Elites were asked to speak and act as liaisons between the Red Cross and other organizations, while lower participants were not. A different status was given to the two groups. Status was measured as access to official power. The elites had access and lower volunteers did not. Status and norms together described the typical volunteer roles in the Red Cross (Adams, 1980, p. 107).

Ellsworth's (1962, p. 887) study of the YMCA examined role expectations and consensus about these roles. In a survey of 141 paid staff and 187 volunteers, he found less consensus about role expectations among volunteers than paid staff. A positive relationship between role consensus and gratification was found in volunteers.

The linkage between these concepts drawn from the voluntary literature is their involvement in the organizational procedure known as training. The goal of training, the organizationally sponsored activity which occurs after the initial motive to volunteer, is to teach role expectations and develop continued commitment.

Training Adult Volunteer Instructors

Training is "a special kind of teaching and instruction in which the goals are clearly determined, are usually

readily demonstrated, and call for a degree of mastery which requires student practice and teacher guidance and appraisal of the student's improved performance capabilities" (Good, 1973, p. 613). A trainer, is defined as "an instructional leader who plans and conducts a learning activity designed to help participants acquire information, skills, and attitudes in a particular content area" (Good, 1973, p. 613).

Volunteers who teach community courses are not chosen for their skill as teachers. They usually display superior competency in technical skills and knowledge, but have little knowledge about adult learning (Adams, 1980, p. 106; Rauch, 1972, p. 84). Organizations train volunteers to teach their courses (Bachman, personal communication, 1988; Hillman, personal communication, 1987; Hussey, personal communication, 1987).

Goals of Training

Training in voluntary organizations is a means to another goal, such as better health or socialization (Hoffer, 1970, p. 335). Training is usually a formally structured learning experience led by a trainer or facilitator. Its goals are to teach information and/or build skills. Training certificates are often issued (Lavin, personal communication, 1987; Quinn, personal communication, 1988; Workcuff, personal communication, 1988).

Voluntary organizations conduct two types of training:

staff training and community education courses. The goal of staff, volunteer and paid, training is to increase competence and knowledge in its workers. Training is necessary to prepare the workers to fulfill the organizational goals. Community education courses are training activities conducted to fulfill the purpose of the organization. In the Red Cross, an example of staff training is a course to become an instructor in a child care course. An example of community education course is the actual presentation of a child care course (Silva, personal communication, 1987).

Some authors advocate that the goal of training in voluntary organizations should be broader than specific task training. Training should change knowledge, skills, and attitudes of participants (Stenzel & Feeney, 1976, p. 18; Wilson, 1984, pp. 50-52). During training, volunteers can develop skills and attitudes for creative problem solving and meaningful activity (Wilson, 1984, p. 139). Stenzel and Feeney (1976, p. 18) wrote that the core content for all training is a certain body of knowledge and values that all volunteers need to understand, accept, and practice pertaining to the type of activity he or she will do.

Process of Training

The training process is defined as the content presented and how the participants and the trainer interact

with each other. Factors in this process are the characteristics of the participants and the learning activities. Training manuals of the American Red Cross (1987, pp. 1-13), the Boy Scouts of America (1985, pp. 1-18), and the YMCA (1974, p. 24) listed characteristics for successful learning experiences of volunteers that are consistent with adult education literature. These manuals state that training should foster the learner's self-esteem. They advocate for trainings to have an open and trusting atmosphere, a variety of learning experiences, positive feedback, and explain immediate application of content.

Human resource development (HRD) literature identifies characteristics of training volunteers that were different from training paid staff. Lauffer and Gorodezkey (1977, p. 47) wrote that the different motives and less time commitment of volunteers are factors that need to be addressed in training. To meet the volunteer needs the trainer should allow time for participants to share their experiences with each other and incorporate group dynamics and opportunities for social interactions into volunteer training events (Chalofsky & Lincoln, 1983, p. 29).

Lean (1984, pp. 20-25) identifies elements to be emphasized in volunteer training. These are: (a) transference of improved performance to other settings; (b) pride in the task and organization; and (c) high standards

for performance. The content of the training should address the participants' needs, as well as the organization's, and explain the expectations, roles, and responsibilities of volunteers (Lean, 1984, p. 20).

Design of Volunteer Training

The largest section of literature about voluntary training is composed of how-to manuals: these present design techniques based on adult learning principles, how to lead training sessions, and how to evaluate training outcomes (Lauffer & Gorodezsky, 1977; Schindler-Rainman & Lippitt, 1975; Stenzel & Feeney, 1976; Wilson, 1976).

Wilson (1984, p. 50) identifies nine characteristics of training within voluntary organizations. These are: (a) structure; (b) responsibility; (c) reward; (d) risk; (e) warmth; (f) standards; (g) support; (h) conflict; and (i) identity. Structure is how many rules, regulations and procedures exist. Responsibility is being independent and not having to double check all activities. Rewards are positive sanctions for a job well done. Risks are the challenges in the job and organization. Warmth is the feeling of fellowship and cooperation. Standards are the implicit and explicit performance expectations. Support is the perceived helpfulness of staff and volunteers. Components of training that deal with conflicts are opportunities to hear different opinions openly, rather than

ignoring them. Identity is feeling that you are a valuable member of a working team (Wilson, 1984, p.50).

Many voluntary organizations like Red Cross (1987), Boy Scouts (1986), Heart Association (1987), and Center for Voluntary Development (1986) have courses and manuals on preparing, training and evaluating programs. Training manuals and courses in some voluntary organizations reflect design principles of adult education. Design elements of climate setting, planning, diagnosis of need, formulating objectives and activities, and evaluation in Knowles' HRD model (Knowles, 1984, p. 116) are included in manuals of the Associations of Junior Leagues (R. Hellman, personal communication, 1987), Girl Scouts of America (Hussey, personal communication, 1987) and Boy Scouts (J. Merton, personal communication, 1987). A framework for examining the goals and process of training volunteers was offered in the literature of socialization.

Socialization

The literature on socialization includes descriptions of the process and types of socialization. Within these descriptions, the dimensions of socialization and the methods to study are identified.

Process Description

Numerous writers describe the process of socialization (Etzioni, 1975, p. 243; Goslin, 1969, p. 2; Frank, 1981, p.

265; Turner, 1982, p. 48). The overall pattern of socialization is the same in different organizations (Etzioni, 1975, p. 243; Frank, 1981, p. 265). Etzioni (1975, p. 254) wrote that socialization is the process through which the existing structure and common practices of an organization are transferred to new participants. Turner (1982, p. 49) described socialization as a process to motivate, teach skills, and provide personal interaction to alleviate anxiety associated with new situations. People enter the process of socialization with different knowledge, skills, and attitudes. This process of socialization, as it pertains to volunteer instructor training, was examined in this study.

Training for a new job in a new work setting is known as organizational socialization (Etzioni, 1975, p. 261; Inkeles, 1966, p. 277). Voluntary organizations sponsor training to induct and teach new members skills and the organizational way of doing things (Bachman, personal communication, 1988; Silva, personal communication, 1987). The period of time to study the socialization process is the "time before or shortly after the new participants join the organization when efforts to induce consensus between newcomers and the rest of the organization are intense" (Etzioni, 1975, p. 246). In voluntary organizations this time and process of intense socialization for community

instructors was identified as the instructor training period.

Perspectives about socialization depict the process to be organizationally oriented, or individually oriented, or a combination of both individually and organizationally oriented. In the organizationally oriented perspective, the socialization process is dominated by the sponsoring organization. Etzioni's (1975, p. 246) definition of "socialization as a process by which beliefs, norms, and perspectives of participants are brought into line with the organization" depicts this perspective. In socialization with an individually oriented perspective, the learner makes choices and decisions during the socialization event (Goslin, 1969, p. 3). The individually oriented socialization perspective is summarized in Brim's (1966, p. 30) definition of socialization as, "the process whereby individuals learn and internalize the attitudes, values, and behaviors appropriate to persons functioning as social beings and responsive, participating members of their society."

On the basis of the independent nature of volunteers (Dailey, 1986, pp. 21-23) it was predicted that neither the individually oriented nor the organizationally oriented approach alone would work. Both the organization's and participant's needs must be addressed. The socialization perspective that incorporates both the individual's and

organization's needs was defined by Goslin (1969, p. 7) as, "A two-way process, wherein a goodness of fit between the individual and the social environment, is striven for."

The socialization definition chosen for this study reflected the "goodness of fit" perspective between the individual and organization. Socialization was defined as "the process by which actors are made willing to deposit motivational energy in roles thereby willing to conform to norms and are given the interpersonal skills necessary for playing roles" (Turner, 1982, p. 48). From this definition the key elements of socialization--process, motivation, roles, norms, and interpersonal skills--are identified.

The nature of the socialization process in any organization or social group is pivotally related to the nature of the organization and its practices of selectivity and control. Voluntary organizations are classified as normative organizations. Normative organizations are depicted as: (a) requiring a high degree of consensus among lower participants, (b) having ritualistic ways of attaining goals, attitudes and participation, (c) little direct control over their workforce, and (d) use of selectivity to control the workforce (Etzioni, 1975, pp. 19, 44, 94 & 375).

Normative organizations use selectivity as a control mechanism for their workforce. Control, also referred to as subordination, is used to gain conformity to organizational

standards (Etzioni, 1975, p. 19). Selectivity is the way normative organizations try to counterbalance for the lack of control over the daily behavior of their workforce. Volunteers must meet basic selection criteria before they are allowed into a program or organization. Volunteers are selected for a position based on the organizationally desirable qualities that they bring to the position. If an organization accepts anyone who applies, socialization is the process to acquire organizationally desirable qualities (Adams, 1983, p. 34). The amount of socialization needed depends on the selectivity criteria of participants. If no selection criteria is used, then extensive socialization is needed (Etzioni, 1975, p. 19).

Adams (1983, pp. 34-37) wrote that the workforce in the Red Cross has four types of workers and these workers differed according to degree of socialization and selection: (a) paid staff are highly selected and highly socialized; (b) board members are highly selected and low on socialization; (c) volunteer workers (e.g. instructors) are low on selectivity and high on socialization; and (d) walk-in workers (e.g. disaster workers) are low on selectivity and low on socialization.

Normative organizations usually rely on socialization to produce a workforce with desirable characteristics (Etzioni, 1975, p. 19). Programs with little control and low

selectivity requirements, allowing anyone to join--most voluntary organizations--must rely on socialization to produce a workforce with desirable characteristics (Etzioni, 1975, pp. 261 & 375; Adams, 1983, p. 38).

Normative organizations use training programs to socialize the workforce. During training, the agency's ideologies and moral and social activities are presented and the symbolic rewards for volunteers are explained. During this process, volunteers develop a commitment to the organization (Etzioni, 1975, pp. 44, 94, & 375).

Types of Socialization

Three distinctive types of socialization have been identified. These are instrumental, expressive socialization, and goodness of fit. The goal of instrumental socialization is job skill competency. Job skills are the knowledge, skills, and attitudes needed to do the tasks (Brim & Stanton, 1966, p. 3; Lauffer & Gorodezkey, 1977, p. 49; Moore, 1971, p. 861).

The goal of expressive socialization is acceptance of professional values and norms of behavior. Training for expressive socialization--acceptance of organizational values and norms of behavior--must have a strong affective component (Moore, 1971, p 809). Negative reinforcements, such as fear of disapproval and punishment, and positive reinforcers, like positive role models and identification

with a team, arouse emotional feelings during socialization (Moore, 1971, pp. 808-809). The socialization process in voluntary organizations needs to be both instrumental and expressive (Etzioni, 1975, pp. 252-254).

Dimensions of Socialization

Four dimensions of a socialization process have been identified. These are (a) role development; (b) frequency of cues to help individuals evaluate performance of self or others; (c) the type and rate of professional language; and (d) the contextual (climate) characteristics of the system (Goslin,1968, pp. 14-20; Sredl & Rothwell, 1986, p. 119).

Many authors think that the first dimension, role development, is a central component of socialization (Moore, 1971, p. 808; Sredl & Rothwell, 1986, p. 198). A study of role development examines the processes by which people acquire the knowledge, skills, and attitudes to perform a social role (Dreighton, 1971, p.304; Goslin, 1969, p. 6; Sredl & Rothwell, 1986, p. 197-201). In jobs where the responsibilities and activities are established prior to the socializing event, the role development is learning a prescribed role rather than negotiating a new contract (Goslin, 1969, p. 7).

Role development is cumulative. New roles build, modify, or elaborate on past roles. People bring knowledge, skills, and attitudes from previous positions to new

positions. Factors in role development are previous experiences, the ability to understand how others perceive behavior, and the significant differences between what is actually expected of an individual and the ideal role.

Studies have proposed that role development begins before enrollment in the professional school or acquisition of a new position. The Theilen's (1958) study of medical school socialization found that the basic normative (value) orientation of students did not change during medical school (Etzioni, 1975, pp. 250-251). Students entered medical school with desired medical professional values. These were gained in premedical courses in college or from relatives who were medical professionals. Similar insights about the pre-socialization of attitudes were featured conclusions of the Baeumeler's (1965) study of youth volunteers and the Wuthnow's (1986) study of student nurses. Baeumeler's (1965, p. 2907) interviews of high school students disclosed that students who volunteered had parents and grandparents who were volunteers. These youth brought to their volunteer experience their previously formed attitudes and knowledge about volunteering. Wuthnow's (1986, pp. 120-125) survey of nurses found that college education was a pre-socializer for candidates entering nursing school. Many attitudes and social behaviors needed for the nursing profession were previously taught in college. In the case of medical schools

pre-training was a selection factor, but in Baeumeler's study of youth volunteers it was not a selection factor.

Case studies of professional schools found that much of the expressive socialization, acceptance of professional values, occurred either in the family or college, prior to entry in professional training. Vocational schools begin the socialization process for many trade occupations. Professional schools are selective about pre-socialized traits of participants who will enter their professions (Etzioni, 1975, pp. 250-251; Sonn, 1975, p. 3149; Wuthnow, 1986, p. 124).

Nordstrom's (1973) and Ellsworth's (1962) studies focused on roles in the non-profit sector. Nordstrom (1973, pp. 1-3) found that training based on role socialization theory would improve practice of social workers. Ellsworth (1962, p. 1) found a relationship between role consensus and gratification in a study of YMCA workers.

The second dimension of socialization is behavior cues. Cues are elements which facilitate or inhibit the learner's assessment of his own behavior and provide him with information about expectations (Goslin, 1969, pp. 13-19; Moore, 1971, p. 819; Tannenbaum & McLeod, 1967, p. 4; Turner, 1982, p. 49). Ondrack (1975, pp. 97-98) wrote that cues, signals, and messages which allow people to judge acceptable and unacceptable behavior are essential to

learning social roles.

Rewards and sanctions are presented as cues enabling the individual to distinguish between adequate and inadequate role performance (Goslin, 1969, pp. 6-14). Withholding or awarding job satisfiers and dissatisfiers (Sredl and Rothwell, 1986, p. 212) are cues to appropriate behavior. Job satisfiers are salary, achievement, recognition, task itself, responsibility and advancement. The job dissastisfers are policy and administrative procedures, interpersonal relations and working conditions. With the exception of salary, these rewards and sanctions are applicable to volunteers.

Both positive and negative sanctions are used as control mechanisms in voluntary organizations. Pearce's (1978, p. 203) comparative study of volunteer and paid staff in 14 different organizations found that the rewards and sanctions were different for volunteers than paid staff. Volunteers were rewarded by personal pride and recognition, social interactions, and a sense of knowing they contribute to the community. Volunteers were sanctioned by humiliation, deprivation of support or social opportunities and harassment. Paid staff were rewarded with salary, benefits, and promotions, and sanctioned with dismissals and demotions.

The third dimension of socialization is language.

Language, verbal and nonverbal, is a tool for interacting with the system. The importance of language in the socialization process is recognized in the socialization literature about children. As a child learns to use language, the range of behaviors and rate of interactions that he or she can symbolically express increases at a phenomenal rate (Brim, 1966, pp. 77-79). Language provides common meanings for interactions. It can be verbal or nonverbal language. Eye movements, facial expressions, body postures, hand movements, and spatial arrangements are examples of nonverbal language expressions (Patton, pp. 149-150). Through language, cultural patterns of values, beliefs, and practices are transmitted to participants (Turner, 1982, p. 49). During occupational socialization, the frequency and use of technical language of new workers increases (Patton, 1980, pp. 147-148; Tannenbaum & McLeod, 1967, p. 4).

The fourth dimension of socialization is the context. The characteristics of the participants (volunteers), the training environment, and the voluntary organization provide the context for socialization. Characteristics of volunteers and the training environment were detailed in previous sections of this chapter.

The characteristics of the organization are described in its organizational structure and corporate culture.

Argyis (1956, p. 3) described voluntary organizations as formal organizations. The characteristics of formal organizations are: (a) rational logical order to achieve objectives; (b) task specialization; (c) a chain of command to communicate specialized activities; (d) activities planned by a designated leader; and (e) the span of control of any leader is limited to 5 or more subordinates whose work interconnects.

The frequency of workers' interactions with the system is limited in formal organizations. Argyis (1956, pp. 1-2) wrote that the desired organizational characteristics of workers in a formal organization are passivity, dependency and subordination. Adams (1983, p. 35) concluded that Red Cross desired such organizationally characteristics in its disaster volunteers. Adams wrote that the Red Cross desired volunteers to be obedient, dependable, and docile.

Examination of Socialization

The study of socialization--to integrate new members into a cultural system--has been examined from two main viewpoints. These are (a) degree of consensus between lower participants and organizational representatives in a number of spheres; and (b) examining the process of introducing new participants to the culture of the organization (Etzioni, 1975, p. 253).

The first method examines socialization outcomes. The

attributes of role aspirants (new unsocialized members) are compared to attributes of role incumbents (socialized members). Attributes are behavioral acts and cognitive components such as values, attitudes or beliefs. The role incumbent group provides a standard to measure the progress of new members. The index of socialization is the degree of similarity between role-aspirants and role-incumbents (Tannenbaum & McLeod, 1967, pp. 27-37).

The second method examines the process of socialization. Sills (1968, pp. 557-558) wrote that an understanding of the process of socialization is gained through examination of (a) characteristics of the person being socialized; (b) person's relationship to the socializing agent; and (c) how the content is transmitted. The Sonn's (1975, p. 836) study of nursing students and the Friebus' (1975, p. 528) study of student teachers are examples of this approach. Sonn (1975, p. 836) found the attitudes, values, and roles of instructors to be major factors in socialization. The Friebus (1975, p. 528) study identified (a) the major socializing activities; (b) how they were carried out; (c) who were the principle agents; and (d) what were the major outcomes of the process. The Friebus found the student teaching process to be loosely structured with few causal links among its components and limited in its effectiveness.

Summary

The above review presented the three principal fields of literature and practitioners' experience relevant to the preparation and practice of adult volunteer instructors as a potential socialization process. It appeared that while components and applications of a socialization framework exist, the application of socialization concepts to analyze adult volunteer instructor training had not been implemented for either academic or practical purposes. Therefore, the configuration of the above insights into a research design and methodology for the present study became the purpose of the following chapter. The apparent value of socialization research for the public and private sectors suggested a similar worthiness to apply socialization insights to the voluntary sector training activity.

The journey to discovery required a review of more than 100 books, journal articles, and dissertations. Manual searches of the Business Abstracts, Social Science Index, Research of Education, Education Index, and Journal of Voluntary Action Scholars from 1976 through February 1990 were completed. Key descriptors in these searches included voluntary organization, volunteers, adult training, and socialization. The year 1976 was a threshold date for voluntary organization and volunteer research because Pearce's (1978) dissertation developed a conceptual theory

of volunteerism based upon published research prior to 1978. Computer searches of ERIC from 1966 through 1987, Social Scisearch Database from 1972 through 1987, and American Society of Training and Development Information Center data bases focused upon volunteers, adult training and socialization. Dissertation Indexes from 1953 through March 1990 were reviewed. Recent annual reports and training manuals from 10 national voluntary organizations were scrutinized with special emphases on training programs and volunteers involved in training. Telephone, or face-to-face, interviews with 18 Directors of Training, or trainers, in voluntary organizations were implemented on the topics of teaching community courses and training volunteers.

Voluntary organization sources of information provided an understanding of the contemporary voluntary organizational environment and the training function therein. Volunteerism in general and the adult volunteer instructor training function in particular were delineated. Adult education in general and training in particular were clearly focused in the review of literature and expert insights. Socialization concepts, dynamics, significance, and implications for their application in the voluntary sector became apparent in review and reflection about the socialization literature pertinent to the private and public

sectors. Research design criteria and methodologies emerged from the above literature reviews and related expert interviews.

Personal and professional curiosity motivated my pursuit of the process and components of the socialization process of volunteer instructor training. The final approach to literature and interviews was anticipatory and strategic: configuring new knowledge and insights for the design and development of a framework and methodology for future application by the author and other researchers in the field.

CHAPTER 3

METHODOLOGY

Case Study

The training process through which adult volunteer instructor candidates were socialized into their roles as instructors for the EA and how did this process work were studied through a qualitative case study method. The research questions established the framework and concepts to examine the socialization of adult volunteer instructors.

The research questions were examined through a qualitative case study approach. A case study permitted the collection of comprehensive, systematic, and in-depth information about the situation without imposing pre-existing expectations or manipulating the variables (Patton, 1980, pp. 40 & 303). The case study approach was appropriate because the boundaries between the contemporary phenomenon and its context were not clear (Yin, 1984, p. 23). In this study the training--the planned socialization event--and the instructor candidates--the carriers of the process--were not manipulated by the researcher, and the phenomenon and the context were intertwined.

The case study described the training expectations of EA actors--administrators, trainers, and the instructor candidates--and the activities and interpersonal dynamics during the training event. From the interviews and

observation data, a description of the training expectations and the training process from the viewpoint of the EA officials (three administrators and one trainer) and participants (instructor candidates) was developed.

Observation and interviews disclosed the underlying structure of the program. The values, habits, and role expectations of this structure, expressed by the trainer and the instructor candidates, differed from what each expected (Darkenwald, 1980, p.64; Light, 1983, p. 58; Yin, 1984, p. 19). Observations and interviews revealed the extent of these differences.

Selection of the Cases

The study examined the socialization process of volunteer instructor candidates during an EA first aid instructors course. The sample was selected with the purpose being to collect data that typified instructor candidate training courses and to provide data useful to describe the phenomenon (Patton, 1980, pp. 100-107).

The course selected was the first aid instructors course which is 16 hours long. It was conducted in a large midwestern EA council which served a central city district, as well as rural and suburban counties. The council selected for the study had a national reputation for excellent course administration, community instruction to diverse community groups, and a high volume of first aid

instruction per year.

This particular course was chosen for several reasons. The first aid course was one of the mandatory courses that all EA Community Education units must offer. It was one of the most frequently taught instructor courses. First aid instructors constituted the largest category of EA volunteer instructors. The market for this course was the most extensive in the EA network. Unlike the market for the Medical Rescue Training course which was limited to rescue squads, community groups, people from youth agencies, schools, industries, unions, and government agencies were sent to be trained as EA first aid instructors. The first aid instructors course was the induction training for volunteers who wanted to become first aid instructors.

The format and instructional design of the first aid instructors course were representative of other health courses. The recommended class size for all EA instructors courses was six people. The first aid instructors course was one of EA longest training courses. The length of scheduled classroom time for most courses was between three to twelve hours. The classroom time for the first aid instructors course was 16 hours, normally spread over two days. A variety of instructional strategies, videotapes, student workbooks, practice skill sessions, group discussion, and lectures were included.

Instructor candidates for this course were expected to be a heterogeneous group, which is typical in voluntary organizations (Dailey, 1986, pp. 19-21). They were not predominantly professionally trained emergency workers, like the participants in the emergency rescue courses. Instructor candidates were at least 18 years old, a prerequisite for all EA instructors. They were volunteers, not paid staff of the EA.

Instructor candidates were recruited through the usual promotional and recruitment channels of the public broadcast media, newsletters, publications, and informational bureaus of community groups and businesses. This variety of recruitment techniques for past instructor candidate courses produced male and female candidates with a variety of employment status, educational backgrounds, racial groups, and socio-economic classes (R. Workcuff, personal communication, 1988).

Collection of Data

Data collection for this study focused on expectations of volunteer training and the actual behavior during training. The data were collected through (a) interviews with EA officials and instructor candidates involved with the First Aid Instructors course, and (b) observation of the actual training process. A pilot study was conducted to assess the study's feasibility, interview and observation

schedules, analysis techniques, and worthiness of results.

The course administrators, trainer, and ICs registered for the course were formally interviewed prior to the course and informally interviewed throughout the course during breaks and lunch. Interviews were used to collect data about expectations of volunteer training. Open-ended interviews gave the ICs opportunities to "tell their stories"--to find out what they expected from the volunteer training process. The interviews were semi-structured, following the interview schedule for Administrators and Trainers (Appendix A) and Instructor Candidates (Appendix B). Each interview lasted approximately one and one-half hours and took place before the training event. The interviews were audio tape-recorded and transcribed.

The second data collection procedure was observation of the training event. The formal sessions of the 16 hour course, and the informal interactions during breaks and lunch, were observed and audio tape-recorded. Observation data were collected on (a) ICs' and the trainer's expectations and interactions overtime; (b) ICs' changes over time; (c) use of professional language; and (d) structure and conduct training. The Observation Schedule for Verbal and Nonverbal cues and Professional Language (Appendix C) served as a guide for collecting information about the nonverbal and verbal cues and professional

language. The Observation Schedule for the Training Process (Appendix D), based on Knowles' Process Model of training adults (Knowles, 1984, pp. 115-117) was used to organize information collected about the structure and conduct of training.

Analysis of Data

The raw data were translated into a usable format for analysis. The transcripts from the interviews, the audiotape of the course, and the field observations were assembled into a case record. Patton's (1980, pp. 303-304) steps for constructing a case study data were used to organize the field data in the case record for analysis.

The data in the case record were analyzed using the constant comparative method (Darkenwald, 1982, pp. 72-75; Glaser & Strauss, 1967, pp. 107-112; Guba, 1978, p. 56). The transcripts were read and codes denoting emerging categories were placed in the margin of the transcript. The data were coded into as many categories as possible. Each time a new incident emerged it was compared to other incidents previously coded in the same category. As coding continued, this comparison changed from comparing incident to incident to comparing incident with the properties of a category. Properties consisted of the similarity within the category or differences between categories. A category was saturated when the data collected yielded no new information

on the properties. During this process, the investigator's insights were kept in a written log, which served as a record of the logic behind the category development.

The data in the case record were analyzed for findings and conclusions about the research questions. Through this analytical process concepts and patterns describing training as a socialization process were found. During the data analysis phase the raw data were organized into categories. By systematically comparing similarities and dissimilarities between and among the data, patterns of ICs' and their interactions were found (Maanen, 1983, pp. 39-41).

Methodological Issues

Several techniques were used to improve the validity and dependability of this case study. One potential source for invalidity was the investigator's influence on the participants during the interviews and observation. The investigator minimized this possibility by establishing a rapport of open and honest communication with the participants.

The use of a variety of data collection techniques and sources also strengthened each case study's validity (Guba, 1978, pp. 62-67, Yin, 1984, p. 36). The multiple sources used in this study were interviews, observations, the audio tape-recordings, and written notes. The interviews were audio tape-recorded, and followed the standardized interview

schedules. The transcript of training served as a validation of the observer's field notes. A chain of evidence to make specific links between the questions asked, data collected, and conclusions was provided through field notes, transcripts, coding the raw case data, and the investigator's log. Future replicability of the study will be possible through the written description of the research process and the interview and observation schedules. The findings of this case study can not be generalized to a larger population, but they can be illustrative of concepts in socialization, voluntarism, and adult training literature. Through its ability to relate the findings to theory and previous research, the study gained external validity (Yin, 1984, p. 36).

Summary

The research design, data collection, data analyses, and related methodological issues identified in this chapter offered the framework, instruments and methods by which to cross the threshold of intellectual reflections, literature review, and design of the study into the actual implementation of the study. Chapters 4 through 10 describe the findings, present analyses, and report conclusions and recommendations about the first aid instructors course as a socialization process.

CHAPTER 4

DESCRIPTION OF THE PROCESS

The purpose of the study was to describe the training process through which volunteer instructor candidates (ICs) were socialized into their roles as instructors and how this process occurred. The results of the study were: descriptions of the training setting, principal transactions, group interactions and EA officials; case studies of ICs; and categorizations, analyses, and findings of ICs' presocialized characteristics; socialization dimensions during training; socialization dimensions after training; and comparison of ICs' and officials' expectations to the events of training. Descriptions of the training event and officials and the ICs' case studies are presented in this chapter.

Description of The Training Event

Training Setting

Ten instructor candidates and one trainer gathered in a large training room. The room, filled with equipment and supplies, was on the northeast side of the EA's regional office building. The building was located in a northern suburb, fifteen miles from the center of a midwestern metropolitan city, and surrounded by rural farming communities.

There were two entrances into the training room from the main hallway of the EA's office building. One door was

at the north end of the building and next to the back door to the building. The other door into the classroom lead into the main hall of the building and to the rest rooms and snack area. It was a sensory stimulating, multi-purpose room, approximately forty feet by twenty feet. Approximately ten steps inside and to the right of the north door were four, three by eight feet, tables extending end to end in a row from the front, north, end of the room to the back, south end. In the center of the room and in a direct line with the north door was a large wooden desk. The instructor's desk and the row of tables formed an L shaped figure.

The north wall of the building, the front of the room, was a concrete block wall painted beige. A large window was centered in the beige concrete block wall. Against this wall from left to right, before the window, were a 10 foot wide rectangular freezer, a white porcelain vertical refrigerator (with sodas for purchase by putting 50 cents in the jelly jar on top of the refrigerator), and a second identical refrigerator with a sign taped to it, "Emergency Only". On top of the refrigerators were two by one foot cardboard displays with the EA symbol and a different slogan about helping people on each display. About every hour a rumbling noise from these appliances reported they were functioning.

The glass window, approximately 12 feet by 8 feet, was in the center of the north wall. It extended for three fifths of the width of the room. The levelor blinds on this window were adjusted to allow sunlight to enter through only one foot above the bottom of the window sill. The wooden instructor's desk was approximately seven feet in front of the window. Notebooks, boxes of gauze pads, Annie's (name of a mannequin) head, and the instructor's pocketbook were piled on top of the instructor's desk. An American flag in a floor stand, the type found in public school classrooms, stood slightly behind and to the right of the desk.

On the remaining fifth of the north concrete block wall were three shelves each with equipment spread unevenly on them. Folded cots were stored on the top two shelves. The next shelves had adult blankets, children's nap blankets, and strip bandages dangling over the edges of the shelves. Stored on the bottom two shelves were wooden splints, more blankets, and floor mats.

In the corner, adjoining the north and east wall, were two collapsed portable projector screens leaning against the walls. Two large windows, approximately, 12 by 8 feet each, were evenly placed in the center of the east wall. The blinds on these windows were closed. If they opened, the view would have been a parking lot for a car dealership. Occasionally, the loud speaker, calling salesmen to the car

show room was heard in the classroom. In front of the first window on the east wall was a wooden upright Knabe piano with the keyboard side facing the window. Between the two windows was a section of concrete block wall. On this wall was a four by two feet EA symbol on a white background. Into this wall a room divider was built. If it were extended, the classroom could be divided into two different rooms. It was not extended. Folded metal chairs were stacked against this wall below the window.

In the corner, joining the east and south wall, was a four by two feet metal file cabinet. On top of this cabinet was an EA, two by two feet, three dimensional display of the EA logo.

The east wall was one long bulletin board extending from the ceiling to four feet from the floor. A projector screen was extended from the ceiling in front on the bulletin board and in the center of the room. The bulletin boards were decorated with leprechauns and shamrocks and decorations for a St. Patrick's day fund raising luncheon. From the ceiling hung four streamers of green and white crepe paper forming a tent like effect from the center of the room to the four corners. In between the St. Patrick's day decorations on the bulletin boards were six different styles of EA's shirts or jackets for sale. Below the bulletin board were closed wooden cabinets with brass

cabinet door knobs.

In the west wall, two feet from the corner with the south wall, was a door that led into the hallway. On the concrete wall, from this door to the wall divider in the center of the room, were metal shelves extending from the floor to the ceiling. Neatly stacked on the top and middle shelves were medical supplies, lances, syringes, and handouts for other courses. On the lower shelves were mannequin cases. On the other side of the divider was a metal coat rack and a wall clock hidden behind the coat rack. A person wanting to know what time it was would have to look between the coats to see the time. More adult and baby mannequins and their cases were between the coat rack and the front door. The instructor candidate's row of tables was about three feet in front of the equipment and items stored against the west wall. The candidates sat with their backs to the west wall and looked onto the open space, the practice area.

The open floor space, partially surrounded by L-shaped design formed by the instructor's desk and row of tables for candidates, was the area for the skill demonstrations and the practice teaching sessions. The brown carpet in this area was stained in several places. Alice explained that the stains were caused by carelessly spilled solution used to disinfect the mannequins.

In this open area, approximately 4 feet from the instructor's desk, was a large TV monitor and VCR equipment on a metal stand extending eight feet high, facing the instructor candidates. In the middle of the room were two smaller metal tables about three feet high with a slide projector facing the projection screen on the south wall, and a small audio cassette tape player. After the first four hours of the course, these projector tables were moved behind the upright piano.

The room was well lit by fluorescent ceiling lights. It was quiet, except for the occasional noises from the refrigerators, the buzzer on the back door to the office building, announcements from the car dealerships, and typing sounds from the EA's offices down the hall. Both days the room was cold in the morning and hot in the afternoon.

On both days the trainer and the instructor candidates were dressed casually in slacks, jeans, dress shirts, t-shirts, sport shoes, or work boots. On both days the trainer wore sport shirts without EA's logo or a name tag.

Principal Transactions

To register for the course the instructor candidates, their secretaries, or their boss called the EA office and gave the instructor candidate's name to the receptionist at the EA office. They knew about the EA's first aid instructor's courses from past experience and knowledge or

through the EA's advertisements in community newspapers. When the candidates, or their representatives, called the office they were told that the course cost was $40.00, and that the candidates needed to have a current certificate in the basic first aid course. A check or credit card number was needed to reserve the person's place in the course. Two weeks prior to the course, when the course limit of ten was reached, no more registrations were accepted. For everyone, except Hanna, the course fee was paid by their place of employment. The EA paid Hanna's fee because she was planning to teach community classes for them after training. After the $40.00 was paid, the EA sent a letter to the instructor candidate confirming the place, days, and time of the training, as well as instructions to wear comfortable clothes because the course included practice sessions on the floor.

The course was held on Wednesday and Thursday from 8:00 a.m. to 5:00 p.m. Each day's class began on time. The first day ended 15 minutes early. The second day ended on time.

Alice, the instructor trainer, began the course by introducing herself. She gave an overview of the course. Then she explained the locations of rest rooms, timing of breaks and lunch, and fire evacuation procedures. The candidates paired off and introduced each other. This activity took 20 minutes.

After the introductions, Alice showed a slide series and lead a question and answer session about the organization's history and services from 8:21 a.m. to 8:54 a.m. She led this session without looking at her notes: no one in the group took any notes. Candidates participated in the discussion by answering the questions Alice asked.

A ten minute break followed. During this and the other breaks the candidates went to the rest rooms, to the canteen area where there were vending machines, and outside to smoke cigarettes.

For the next hour Alice and the candidates discussed the environment's affect on learning, characteristics of adult learning, and the duties of an EA instructor. The candidates were broken into two groups. One group was assigned to discuss how the environment affects learning. The other group was assigned to discuss the characteristics of adult trainees. The topics were discussed in the small groups and an oral report was given to the total group. Everyone actively participated in this activity and a lively discussion with occasional disagreement occurred.

For the hour and fifteen minutes after break Alice lead the group, while seated behind her desk, in a discussion on group process, teaching methods, and course evaluation. Most often when answering questions the candidates looked at Alice when speaking instead of each other.

Then Alice began presenting the duties of an EA instructor. Forty-five minutes before lunch Alice distributed a one page form, course record, for the group to complete. She led the group over the documents, line by line, telling them what to put on each line. Several times, when candidates worked on the form at their own pace, Alice would call them by name and ask tell them to slow down and complete only the section that she said to complete.

From noon to 1:00 p.m. on the first day the group split up for lunch and went to nearby fast food restaurants. Candidates either left by themselves or had lunch with someone they knew prior to the training.

After lunch the candidates filled out another form, authorization to teach, and took a written test on basic CPR knowledge. It was necessary for everyone to pass this test in order to continue in the course. They graded their own tests and everybody passed. Hanna, Mac, and Robert made perfect scores. Those who missed questions discussed these with Alice and the rest of the class.

From 1:30 p.m. to 2:40 p.m., Alice lectured about administrative duties, health precautions, cleaning mannequins, legal liability, customizing the course, accessing emergency medical systems, and lesson planning. During this lecture candidates either stared into space, looked at Alice, or browsed through their books. Alice sat

behind the desk with her head resting on her hand and making little eye contact while lecturing. The lecture ended when Ann asked if the class could take a break.

Returning after a 15 minute break, Alice assigned each person one or two sessions from the basic first aid course as a practice teaching assignment. They were to lead the class the next day in these sessions. All but one of the instructor candidates, Larry, volunteered for one or two sessions. Alice assigned Larry the remaining two sessions not chosen by someone else.

After assignments were accepted, Alice lectured for the remaining two hours of the class. She read word by word each page of the action guides and appendices from the instructor candidate's manual. She repeated the important points on each page and told the candidates that they should underline them. She waited for them to do this. During this time, the candidates were staring into space, looking at the instructor, and sleeping. No one responded when Alice asked for questions or comments.

Alice began the second day at 8:00 a.m. sharp, by giving a five minute overview of the day. Each person sat in the same seat they occupied the day before. Alice explained that the day was an abbreviated version of the course which they would teach after successfully completing this instructors course. The ICs led 18 different teaching

sessions throughout the day. Alice made suggestions and critiqued their performance.

Most practice teaching sessions followed a similar format. The topic was introduced, a video was shown, the candidate leading the session demonstrated the skill; in pairs the ICs not leading the session practiced and demonstrated the skill; ICs were checked off as successfully demonstrating the skill by Alice or the IC leading the session; the action guide was read; and the IC's leadership of the session was critiqued. The sequence of each video segment was the same: an emergency situation was shown; the first aid steps written on the screen were read by a narrator; two first aiders demonstrated the steps previously depicted on the screen; and the steps were reviewed by the narrator while excerpts of the first aiders doing the skills were shown.

During most of the skill demonstrations the candidates worked on mannequins. Only in cases where a victim needed to be standing or have an accessible limb did someone practice on his or her partner. CPR was practiced on a mannequin, but the choking maneuver and the splinting of a broken bone were completed on a partner. The candidates chose their partners and kept the same partner unless he or she was leading the session. During the skills demonstration partners demonstrated, watched, coached, and checked each

other off on skills. A lot of time was spent waiting for the trainer check-off. Sometimes the pairs would talk about emergency procedures, but most often they discussed activities unrelated to the course.

There were nine practice teaching sessions, averaging twenty to thirty minutes each, in the morning with a ten minute break between the fourth and fifth practice teaching session. Lunch was from 11:30 a.m. to 12:30 p.m. People went to lunch in different groups than they were in the day before. The men, except for Larry, went together in one group and the women in another.

After lunch, there were nine practice sessions, with a break between the forth and fifth session. People were laughing and joking more during the afternoon sessions than the morning.

The last thirty minutes of the instructor's course was a written test covering information presented during the first aid instructors' course. Alice graded each test individually. While candidates waited for Alice to grade their test, they completed a written survey form and a course evaluation form. There was no formal closing to the course. As Alice graded each person's test, she explained any questions missed and handed the candidate the instructor's certificate and an EA Instructor's name plate. People left one by one, after Alice graded the test and

handed the candidate a first aid instructor certificate and name plate.

The timeline of the major events of the course activities is presented in Appendix E.

Group Interactions During Training

Analyses of instructor candidates' interactions with each other during training, revealed a pattern of association. This pattern of membership in a training nucleus is indicated in table 1.

Membership in this nucleus was demonstrated by what members did and did not do. Members helped each other during skill demonstrations and practice teaching sessions, talked with each other during breaks, and responded in similar ways to non-members (Larry and Alice). Members of the nucleus answered questions or shared personal experiences when another member of the nucleus was leading a practice teaching session. No one answered a question, nor shared personal experiences, when Larry led his practice teaching sessions. No one shared personal experiences when Alice lead the group.

Nucleus members were observed chatting with other members of the nucleus about topics related and unrelated to the course. Examples of group discussions related to the training topics were: Robert, Mac, George, Rick, and Charlie discussed how adults learn; Nancy, Debbie, Hanna, Ann,

Table 1

ICs' Membership In Training Nucleus

Trainer Not A Member	ICs Members In Training Nucleus	IC Not A Member In Training Nucleus
Alice	Robert, Mac	Larry
	George, Rick,	
	Charlie, Debbie,	
	Hanna, Ann	

Robert, and Mac talked about ambulance services; and Robert, Ann, George, and Charlie discussed teaching with face masks. Discussions unrelated to the course occurred during breaks. Nancy, Ann, and Rick talked about volleyball. Hanna, Charlie, and Robert discussed fishing. Nancy, Mac, and Debbie talked about political decisions affecting their jobs. Nucleus members were observed conversing with each other in different dyads, triads, or quartets. They freely moved from one conversation cluster to another and entered into the discussion. When Larry or Alice approached a conversation cluster, the conversation ended. The nucleus members talked with each other during breaks, but not with Alice nor Larry.

Two nucleus members'(Hanna's and Ann's) interactions with Larry and Alice distinguished them from the other members of the nucleus. Ann's interactions with Larry, and Alice and Hanna's interactions with Alice, differed from other members of the nucleus. During formal sessions, Ann responded to Larry in the same manner as the rest of the class. Everyone initially laughed at Larry's antics, but immediately turned their focus from Larry towards the person leading the session. Like other members of the nucleus, Ann did not support Larry during formal sessions nor associate with him during breaks. Ann's informal conversations with Larry distinguished her from the rest of the group. Ann

spent more time in informal conversation with Larry because she was his partner for most of the skill demonstrations sessions. When practicing together, Larry began conversations criticizing training and Ann agreed with him.

Ann's and Hanna's relationship with Alice distinguished them from the core of the training nucleus and from each other. Nucleus members, with the exception of Ann and Hanna, responded to Alice's suggestions without expressing any negative, nor positive feelings towards Alice. Members of the nucleus, including Ann and Hanna, were not continually disruptive of the formal training process like Larry.

Ann's and Hanna's responses to Alice expressed their individual feelings towards her. Early during the training process, Ann overtly challenged Alice on a couple of issues. Ann stopped contesting Alice after she was dogmatically corrected by Alice for the second time in front of the entire class. After that, Ann conformed to Alice's demands, without saying anything nor making eye contact with Alice nor the rest of class.

Hanna was the only member of the training class to positively support Alice in front of the rest of the group, and informally talk with Alice during the breaks. Hanna, often partners with Alice during the skills demonstration sessions, frequently joked with Alice during these sessions.

Hanna answered Alice's questions during the general sessions, and helped Alice with supplies during class. With the exception of Hanna, members of the nucleus were not observed informally talking with Alice during breaks.

Hanna and Ann qualified as members of the nucleus through their ease and frequency of talking with other nucleus members, by helping other members during skill demonstrations and practice teaching sessions, and by their formal exchanges with Larry. Ann's informal conversations with Larry and her responses to Alice during formal sessions placed her on the periphery of the training nucleus. Hanna's conversations with Alice during formal and informal sessions of training placed her on the other periphery of the training group nucleus. As illustrated in table 2, Ann and Hanna were on opposite peripheries of the nucleus from each other.

Members of the training nucleus interactions with each other were frequent and positive during the formal and informal parts of training. Alice and Larry were not members of the training nucleus. Hanna and Ann were members of the training nucleus. Their interactions with Alice and Larry placed them on the periphery of the nucleus.

A training nucleus illustrated that a group formed during training. It did not describe whether or not the group and its members were aligned with the socialized

Table 2

Differences Among Members Of The ICs' Training Nucleus

Trainer Not A Member		ICs Members In Training Nucleus		IC Not A Member In Training Nucleus
Alice	Hanna	Robert, Mac, George, Rick, Charlie, Nancy, Debbie	Ann	Larry

standards for EA's instructors. The detailed descriptions of the training setting and group interactions during training offered a part of the contextual background for understanding the ICs' progress during the training event analyzed as a socialization process. Information about EA's officials provided additional contextual information.

Emergency Association Officials

There were four officials in this study, three administrators and one trainer. Two of the administrators, Nathan and Elizabeth were also certified as trainers of first aid instructors course. These four officials formed the First Aid Advisory Committee. As advisory committee members, they established the policies and determined the activities related to the first aid instructors course. They were responsible for monitoring the first aid instructors. The officials' perspectives provided a context to understand the socialization of ICs. Officials were role models, reference points and sources of parameters for ascertaining ICs' progress during the training.

Administrator 1 - Yvonne.

Female; white; 35 to 45 age range; masters degree.

Yvonne was the paid administrator responsible for all volunteer programs, including recruiting instructors and scheduling first aid courses, for the regional office that was the training site. She was not certified as an

instructor trainer in any of the health courses. Her major responsibilities were to maintain the infrastructure supporting the volunteer programs. She remarked that the number of volunteers in EA was declining because EA was requiring volunteers to conform. She said,

> Our volunteer base of instructors has gone down as we impose restrictions on them, such as signing the national agreement....I think instructors were frustrated by all that.

Administrator 2 - Nathan.

Male; white; 25 to 35 age range; college degree.

Nathan was a math teacher at a parochial school and served as a trainer for EA first aid instructors for 14 years. His business card read:

> Nathan D. Jones, Instructor
> Mathematics, Physical Education
> Emergency Association Volunteer.

A couple of years ago he was EA's Volunteer of the Year. A picture of him in a jacket covered with EA's pins and patches was on the cover of that year EA's annual report.

His opinion of the type of commitment of current EA instructors was given in the following statement:

> I don't think there is commitment to the old fashion volunteering that we used to have. My teaching is geared to keeping my instructor certificates and meeting any local needs like serving my school. A lot of volunteers are doing this. Just enough to keep them in [certified to teach] and no more.

Administrator 3 - Elizabeth.

Female; black; 35 to 45 age range; masters degree.

Elizabeth was an EA volunteer for 15 years. Her initial involvement with EA began when she was employed with Scouts. In Scouts she was required to teach the EA first aid courses. She was considered a volunteer for EA because Scouts, not EA, paid her salary. She said, "I wasn't getting paid any more to teach first aid." Some of the reasons she continued to volunteer with EA were given in the following statement,

> I teach because it is fun for me. Because I enjoy being a volunteer. I do it to give back to other people, for self-worth, [to] learn about myself. It takes some courage to stand up there in front of other people and teach. You've got to learn some skills yourself.

Trainer - Alice.

Female; white; 55 to 65 age range; high school degree.

Alice was the trainer for the first aid instructors course of this study. She had taught for EA for 15 years. The first seven years she served as a volunteer instructor. The last eight years, she was the paid coordinator for all the first aid and CPR courses in this EA council.

Alice's descriptions of her job, the content of the instructors course, and instructor candidates' attitudes introduced several themes within the training process. She explained that she taught most of the instructor courses. About the first aid instructors course she said, "We don't teach people to teach. We teach them how to run the projector, check-off skills, and fill out the paperwork."

She described ICs as "People [who] are there because they want to be there. If they were sent by their company and don't want to be there, we can usually work it out so they flunk."

Case Studies of ICs

Case 1 - Robert

Male; white; 50 to 60 age range; high school degree.

Before Training

Robert was a circuit tester on an assembly line in a large technology company. He knew that EA's volunteers helped fire victims and military personnel. He described EA in this way, "Any family in need they [EA] are there to help." He came to EA for training because his job required EA certificates. He didn't know any other place that gave first aid certification. He had not volunteered for EA in the past nor taken any previous training courses from EA. In his free time, Robert, volunteered as a fireman and emergency medical technician (EMT). He spent 40 to 60 hours a month volunteering. He justified this time commitment in the statement, "One life saved is worth all the effort you will ever put in."

Robert was trained in combat first aid in the military and advanced first aid during his EMT course. His first aid activities lead him into teaching. He said, "I went from just knowing the skill into teaching to keep my own people

[ambulance and fire department volunteers] certified. I am responsible for the ambulance department...and I wanted to be able to teach at our facility." He taught CPR classes for another voluntary organization for three years and retrained EMT workers for the state. He believed he learned how to teach by doing what his trainers told him in his CPR instructors course and his EMT training.

Robert reported a definite style of teaching which was sensitive to a variety of student attitudes and abilities. He was proud that he never failed a student. He spent extra time with them to review what they missed and re-tested them.

Robert taught the use of a medical device known as the face mask to his students. Although this was a device designed to be used by trained medical professions, Robert taught it to everyone as a health precaution. He said, "I've done CPR four times without a mask and I never intend to do it again without one."

Robert felt inadequate about his teaching personality. He explained,

> The biggest obstacle that I face is feeling a little inadequate myself. I've seen better than me. People respond to them better than me. I had one of my own people tell me, 'you just talking ticks me off'. I don't know why but the way I come across to people sometimes is not really the way I intend it to be. I don't have that outgoing personality that some instructors have and that kinda bothers me.

He was working to improve in this area by trying to tell a joke and watch his body and facial expressions.

Teaching first aid was not a part of Robert's job responsibility. During work he was a member of the emergency brigade, volunteers who responded to accidents on work sites. He was asked to be a member of the emergency brigade because of his medical experience and EMT license.

After the training course, Robert planned to teach 50 volunteer members of the emergency brigade on all shifts at work. He was also willing to teach community courses. He said, "I'll teach a class to anybody who wants it....I'll teach it to the community, anybody in the community, if they want to come. And I would give out EA's certificates."

Robert had a positive attitude towards the training. He took the training course to be able to certify people at work and to learn new skills. He said,

> That [being a certified EA instructor] doesn't mean anything as far as I'm concerned, but that will qualify me to certify people at work. I don't care how many times you go through a course you learn something.

<u>During Training</u>

During the formal sessions of training Robert was quiet. He did not ask any questions. He answered questions when he was asked. During the skills demonstration sessions and breaks, Robert talked about first aid or teaching with his fellow ICs. He talked with Ann about using face masks

and with George, Rick, and Mac about teaching. He and his practice partner, Mac, usually finished their practice sessions before anyone else. When they finished early, Robert would either help another IC who was struggling or talked to another IC about CPR.

He led both of his two practice teaching sessions with confidence. He stood in front of the group, made good eye contact, and talked the students through the steps without referring to his book. While teaching, he complemented other ICs, demonstrated techniques that needed improving, and asked for questions. During his practice teaching sessions his self-perceived inadequacy as an instructor was not evident. His body stance was steady and comfortable. His hands were at his side and he held the manual in his right hand. The ICs interacted well with him. They asked him questions, discussed techniques, and responded positively to his suggestions for improving their skills.

He was polite to Alice and silently implemented her suggestions during the practice teaching sessions. During his first practice teaching session, she frequently interrupted him, took control of the group, and demonstrated a faster paced way of leading the practice session. While Robert checked Ann and Larry on their skills, he and Ann talked about using face masks. Ann asked Robert, "Do you use pocket [face] masks?" Robert said, "Yes I use pocket

masks when I teach my EMT classes. I think it is a good idea." Ann responded, I'm going to teach about face masks even though she [Alice] said not to." Robert replied, "So am I." During his second practice teaching session, he did not follow Alice's cues about how to lead a session. He led it the way he began teaching the first session.

During both of his practice teaching sessions Robert used medical terms like "patients" instead of the first aid term of "victims", and Alice corrected him. He did not use any of EA technical vocabulary terms like 911, instead of EMS, or "action guides", as Alice instructed. When Robert lead his practice teaching sessions, he disregarded Alice's cue not to allow students to share their experiences with the topic.

After Training

Robert's opinions about EA didn't change as a result of the training. He added to his description of EA that it had good training materials. He felt the instructors course was long, but acknowledged that it might have been because he already knew the material. He thought Alice was a firm and thorough trainer. He said, "She really got on my case, if I didn't teach something her way."

Robert taught two courses at work since the training was completed. He found some of EA's ways of teaching skills different than what he was taught originally. He

said that he would try to teach the skills the EA way. He was surprised that the course took so much administrative preparation before teaching. He had no other plans to teach, but seemed confident he would teach more courses at work before the end of the year.

He didn't state plan any special adaptations to the course. When asked about teaching the use of face masks, he laughed and said, "Well, maybe."

Consistencies and Changes During the Process

Robert remained consistent in his favorable perception of EA and teaching. His practice teaching sessions were consistent with his style of teaching prior to the training. He did not lead the second practice teaching session like Alice demonstrated he should. He did not use any of EA's professional language during the course.

Robert's changes were in the area of technical skills. When corrected by Alice, he immediately adjusted the way he did the skill. He did not demonstrate lasting adjustments because in his second practice teaching session he did not follow Alice's cues. He said that he would try to change the way he taught some of the skills in order to conform to EA's rules.

Case 2 - Hanna

Female; white; 35 to 45 age range; high school degree.

Before Training

Hanna planned to be a full time volunteer. Previously she was an active volunteer for EA until her health and financial circumstances required her to work for pay. She no longer needed to work for pay and was resuming her volunteer activities.

She had mixed opinions about EA as an organization. She spoke proudly of EA as, "An organization that helps someone in need, to comfort them in some way, to teach and train these people so they can be a benefit whether in a field or office. EA is a fantastic organization in that [way] and I am very proud of EA in that way." She was not proud of EA's "big business side" [charging for courses]. She said, "People don't understand the big business side of it and the staff don't. I can ask fifty different questions and never get a satisfactory answer. Alice just says it is big business."

Hanna enjoyed volunteering because of the people she met. She described the benefits and commitments from her volunteer activities in the following words:

> I feel that when I volunteer and I teach somebody something then I feel good. It helps me pride wise. I can get so involved in it on a volunteer that I might as well have a full time 60 hour a week job. I feel I have to be the best, even as a volunteer.

Thirteen years ago when Hanna's child was a Scout, she began volunteering with Scouting. She also served on a rescue squad for three years. She disliked the connotation

just a volunteer. She said, "It makes you feel really bad when someone says you are just a volunteer. You have the same education and deliver the same services."

As a Scout leader she was required to take a first aid course. She took the basic and advanced first aid courses. She became certified as an EMT. She had many first aid experiences in her 13 years in Scouting and her three years as an ambulance worker.

Hanna reported that she began teaching because she liked the topic and liked to talk. She said, "I enjoyed it [first aid] so much that I decided that I would like to teach this." Her husband said, "I learned to teach because I talk so much." For five years she taught first aid classes three days a week for EA. Hanna credited her EMT training, the EA instructors class, and her own initiatives as her preparation to teach. She said that she read everything about first aid, no matter how advanced it was.

Hanna planned to teach community classes of first aid when EA asked her to teach. She was confident that EA would find her classes to teach. She expected to teach three days a week.

Hanna had three goals for the instructors course. She said, "I hope to drop this old stuff...I know how to teach an old era, but there is a new era of first aid. I want a better grasp of the new." She wanted to learn how students

would feel in the basic first aid class. She hoped to learn how to get supplies and answers from EA.

During Training

Hanna was a friendly and outgoing person during training. She was the IC who most positively interacted with Alice during training. She answered Alice's questions when the rest of the group was silent. Six different times within the first two hours of training, Hanna answered questions that Alice directed to the rest of class when no one else responded. The ICs listened to Hanna's answers and nodded their heads in agreement with her. On one occasion Mac asked Alice about the legal strength of the Good Samaritan Law. Mac and the rest of class were not satisfied with Alice's answer. Hanna elaborated on Alice's response by saying to the class, "Remember a person is already dead when you start CPR. Figure if you couldn't save them no one else could. Worth trying. Well worth trying." Hanna's comment seemed to satisfy the ICs.

When Alice demonstrated first aid skills to the class, Hanna was her victim. Alice was usually Hanna's partner for the skills demonstration sessions. Hanna joked with Alice during these sessions. Once during a demonstration session, Hanna turned to Alice and asked, "Are you waiting for me to mess up or to give me a compliment."

Hanna interacted positively with her fellow ICs. She

frequently laughed with Robert, Nancy, Ann, and Mac during breaks. Hanna and Mac quietly joked with each other about the time deadlines given by EA for submitting certain forms. After a lecture about the application form, Hanna told a story to the entire class about people who checked the Native American block on their application form because they thought it meant born in America. The entire class including Alice laughed about that.

Her teaching style for both of her practice teaching sessions was consistent with her description of how to teach. She and the ICs seemed to enjoy her sessions. They constantly laughed and chatted with each other during her sessions. While leading both of her practice teaching sessions, she maintained good eye contact, stood confidently in front of the room, and used her manual as a reference.

In her first practice teaching session the ICs laughed a lot. The topic was tying bandages and Hanna did not try to stop the joking. During this session she told ICs to call "911" for help. To close the session she complimented the ICs on their performance, asked for any questions, and made a joke to close the session.

Her second practice teaching session did not have a skills demonstration component. It consisted of a film and discussion. Hanna encouraged ICs to participate in the discussion by thanking them for their suggestions and asking

others' opinions on the topic. She taught the session like Alice demonstrated by saying "911" and "action guide". She told the ICs what to underline in the action guide and did not ask ICs to share their personal experiences with the topic.

After Training

Hanna described training as "long and boring". She said, "I read the instructor's guide during most of the training to keep from being too bored." She expressed her style of teaching and the importance of "teaching properly" in the following words, "It [first aid] is not something to be taken lightly. My name is on the card. You can enjoy it, laugh, and be serious all at the same time."

Hanna had taught 11 courses in the thirty days since training. The day after the instructors course Alice asked her to teach as an instructor paid by EA. Hanna said, "yes." The 11 courses were not taught as a volunteer instructor but as a paid staff member of EA. Hanna explained her new role as, "It doesn't make any difference to me. I teach the same way and the same course. The pay just covers my gas. I can't teach as a volunteer once I'm paid staff because it is a conflict of interest."

She shared two impressions from her teaching experiences about her standards and communication with EA. After being certified as an instructor Hanna co-taught the

course with other instructors. The other instructors did not teach the first aid course the way Alice taught Hanna to teach in the instructors course. Hanna said, "I questioned whether I should conform to old ways. Students were failing, so I just taught as I was taught." Hanna did not enjoy the administrative hassles of teaching. She said, "I wish they would get their act together. No one seems to know what to do. A new person was hired and the old one is never around. There are problems with supplies, registration, and fees."

Hanna did not adapt any part of the course. She said, "I will teach the way I was taught because of the Good Samaritan Law. I can truly say I didn't deviate."

Consistencies and Changes During Process

Hanna was consistent in her enthusiasm about teaching and her teaching style. She encouraged students to ask questions and enjoy themselves. Hanna taught her two practice teaching sessions according the EA's standards. She said EA's technical vocabulary terms of "911" and "action guide". She told ICs what to underline in the action guide.

After training she resisted changing the way she taught to a different standard than what Alice had taught her in the instructors class. She said that she would teach the information in the manual, the way Alice taught her to

teach.

Case 3 -Nancy

Female; black; 35 to 45 age range; college degree.

Before Training

Nancy employed by the city's recreational department, was in charge of several swimming pools. She was a cautiously friendly person, who, after she became comfortable with you, frequently laughed and told stories to make her points. She thought favorably of EA and described EA as "A place to go for people in need...They work for people's needs. Sure there is a limit to how EA helps, but I don't know what it is."

Ten years ago when Nancy was a recreational therapist, she volunteered for EA. She explained, "I used their van to transport our handicapped people. Then, in return for them giving us the van, we did things for them...We were always at someone's disaster. We therapists would divide up and go." She stopped volunteering for EA when she quit her job as a therapist. She volunteered occasionally in her church, but spent most of her free time with her children.

Nancy took first aid classes in college 15 years ago and used first aid skills, rarely, perhaps once a year, at the pools or playgrounds. She thought first aid was so important that all the summer employees should have it. Her employees were not required by law to have a first aid

certificate. Because she thought it was important, she made it a part of the summer workers' job descriptions and departmental policy. She explained, "It helps to have a little bit of knowledge, to know what to do, so it won't scare you to no end."

In her job, Nancy helped adults make arts and crafts. She did not consider that teaching. She was adamant that she did not know how to teach. While explaining that she wasn't a teacher she also explained her style of teaching. She said,

> I don't know how to teach. I am not a teacher. I have it quiet, following instructions and [let them] be on their own. You don't have to be exactly quiet. I don't want you to go haywire, but we can have a good time. Teachers make people sit still and quiet. That's not me.

Nancy believed learning could be fun and that students should work individually. When leading a group, Nancy demonstrated the skill or asked someone in the group to do it. She said, "We can't do everything. Not even teachers. [We need] to be able to explain it." She thought teachers should be knowledgeable and well prepared.

Nancy was not required to teach the first aid course. Her options were to teach it herself or have the EA send an instructor. She took the instructors course to be able to teach her employees at different times throughout the summer.

Nancy planned to teach first aid to 100 summer

employees. She expected to have one or two large classes at the beginning of the summer, then teach smaller classes of 3 or 4 people when new staff was hired. She was willing and expected to teach community classes for EA. She explained, "Knowing EA, from my past experience, it is people helping each other. I'm sure they will give me a call and I probably will. That is how they work. They need volunteers."

The first aid instructors course was held during Nancy's vacation week. The course was so important to her that she gave up two of her vacation days to take the course. She hoped to learn how to teach during the instructors course. She wanted to learn how to deliver information without losing the student's interest. She also wanted information about teaching materials and the name of an EA person to call to ask questions.

During Training

Nancy was a very active member of the training class. She asked several questions posed by other ICs. She frequently laughed out loud and talked to herself during the training. She and everyone around her during the skill demonstrations seemed to have a good time.

Nancy was usually the last person to finish a skills demonstration. She needed the most help from her peers and the trainer to correctly demonstrate the skills. Robert and Mac frequently helped Nancy on her skills. Nancy was

receptive and thankful for their advice. Once when Nancy did a skill incorrectly, Rick said, "You may have been told differently, but this is the correct way." He then demonstrated the skill for Nancy. Nancy did the skill correctly and said to Rick, "Aren't you going to check me off. You're the instructor." After Rick checked her skill, she laughed and said, "Thank you, kind sir."

Nancy's two practice teaching sessions appeared to be stressful for her. During the break prior to Nancy's first practice teaching session, she showed other ICs four pages of teaching notes that she prepared the night before which was her birthday. She stood in front of the class with her instructor's manual and her prepared remarks. She began, rocking nervously back and forth while standing in front of the class, to read her prepared remarks word for word. She stopped reading and asked ICs questions about heart attacks, the topic of her unit. Charlie, Ann, Debbie, and George answered her questions. Alice interrupted Nancy and said, "Just read in the [instructor's] book." Nancy said, "No, no I hate this part. This is bad enough. Can't I start where I want." Alice shook her head and Nancy finished reading the instructor's manual. Nancy asked if anyone had any questions, but sat down before anyone had time to ask a question. Alice closed the session without a critique of Nancy's teaching nor giving a compliment.

Nancy began her second practice teaching session, as nervously as she began the first session. She began reading her prepared notes about animal bites. Alice interrupted Nancy and told her to skip the explanation about bites. Nancy appeared disturbed. She began rattling her papers and rocking back and forth with her left arm folded across to her right shoulder. She turned to Alice and said, "It's hard I planned to discuss bites." Alice responded, "Just slow down. You are making it harder on yourself." Nancy said to herself in a low voice, "Okay just do that and don't worry about discussing details to make it interesting. Okay I can just read what is in the book." As she did this, she relaxed, quit rocking, and moved her hand to a relaxed position at her side. She finished the session by reading word for word the script written in the manual. She taught the part about action guides as Alice had instructed them to do. Nancy told the ICs to underline key phrases in the manual, but did not call the worksheet by its title "action guide". She did not say "911" instead of EMS. During her reading of the action guide, Larry tied a cravat bandage around his head covering his eyes. Ann noticed the bandage, laughed, and pointed it out to the rest of the class. Nancy ignored Larry's behavior and asked other ICs to follow along with her in their manuals as she read. She closed by asking for questions and this time she allowed time for discussion

before she returned to her seat. Alice complimented her on her performance.

After Training

Nancy described training as "Interesting and a lot of work. Maybe a little boring, but I was trying to get something out of it. Certain sections seemed boring to different people." She enjoyed the training sessions on EA's history and how to teach. Her description of EA did not change after training. She described it as, "Worthwhile, always available to help people in need."

Nancy did not teach any courses in the thirty days after the course. She planned to to train 92 people throughout the summer; one course before Memorial Day and, possibly, four other courses later. She expressed her hope for these courses in her statement, "Hopefully I can give what I am suppose to get across in each section." She did not plan any adaptations to the course. She said, "I'll teach it as is."

Consistency and Change During the Process

Nancy showed consistency and change during the process. Her personal style for handling disruptive students and having fun was consistent with her description of training. She ignored Larry's disruptive behavior which was consistent with her explanation of how to handle such situations. Her vivacious and fun-filled spirit was consistent throughout

the process. During training she giggled and laughed, as she did in her pre and post interviews. Her commitment and plans to teach were the same throughout the process. She did not use the technical vocabulary terms "911" and "action guide".

Nancy made a change in her training style to align herself with the cues given for being an EA instructor. She began her first practice teaching consistent with her style of training. She was well prepared and tried to make the sessions interesting to the participants. She changed from this style to reading from a book when she was corrected by Alice. Her second practice teaching closely modeled how Alice taught the ICs to teach.

Case 4 - George

Male; hispanic and native American; 45 to 55 age range; high school graduate.

Before Training

George was a supervisor of the security guards for the midnight shift at a federal reserve bank. He was a quiet man who looked down at his feet when he spoke. He spoke softly in broken English and was difficult to understand.

He had a negative impression about EA. He said, "I was a little uneasy about taking this course. While in the service he heard stories about EA selling gift packs to

soldiers and taking money from families of prisoners of war."

Three years ago he was an EA volunteer instructor. He lost his first aid instructor rating because he didn't turn in the course record. He explained, "I taught at the federal reserve bank. I taught the employees. Where I work, it is really difficult to help people, to teach the number they [EA] need for classes." He came back to EA to regain his first aid certification.

He taught CPR classes for another voluntary organization. He defined volunteering as "helping people". He said that he always helped people throughout his life. Through volunteering he could help others as well as himself. He said,

> The way I look at it, anytime you can be prepared to help somebody it is worth it. When I got burned, there were people there who could help me out. If you can help somebody along the way you never know it could happen to you.

George first became involved with first aid in the U. S. Air Force when he was required to have first aid every six months. He was experienced in treating gunshot wounds and performing CPR.

After retiring from the Air Force, he went to work as a security guard at the bank. The bank required all security officers to have a current first aid certificate. When his boss asked for a volunteer to teach first aid, George

volunteered. The Human Resources Department at the bank notified George when someone needed to be trained and George taught them. He identified himself as, "Kinda an arm of the training department. He doesn't teach first aid."

George liked to teach. He thought that teaching might help him to get a promotion. He admitted that sometimes teaching first aid was boring because he taught so often. He tried to be a good instructor who held everyone's attention and knew the material well. He told "war stories" about real life first aid experiences to make the course interesting.

George planned to teach first aid at work and in the community. He said, "I think this time I'm going to make it a point to teach one like they want. So I don't have to do this [instructor training] again. I would teach at the EA office."

George planned to adapt the course in two ways. He would teach fewer than the minimum of six students per class. He explained,

> I only teach a couple at a time. I have to. But don't tell her [EA administrator] that. You can't get a class. I am sure she is aware of it. We have to put them all on one record. They are trained. It is not like we are just putting names on. We can't just do that cause eventually we'll get into trouble.

He planned to teach the use of face masks for mouth to mouth breathing because his officers were scared of AIDS. He said,

"Those guys won't touch them without a face mask and gloves."

George's main expectation from training was to get his instructor rating back. He thought he might learn some new first aid techniques so he didn't mind taking the training again.

During Training

George was a quiet participant during the formal sessions of training. He fell asleep during the lectures and videos on the first day and the lectures on the second day. He explained to the class that he left work at 7:00 a.m. and started class at 8:00 a.m. He completed the skills demonstrations sessions with ease and usually before most of the class. When he finished early he chatted with other ICs or put his head down on his desk to sleep.

George initiated several side conversations with other ICs. One time George, and Robert talked to the observer about teaching. Rick and Mac listened to their conversation:

> George said to the observer, "I want to know how how an adult as old as me can learn or if they can?" The observer replied, "Sure you can [learn] or you wouldn't be here." George said, "I don't mean this. I mean from a book. I just can't sit down and get it." The observer said, "You just told me [that] I can learn something new each time from them [videos]. The same is true for you." George said, "Oh, I can learn from doing. It is the books." The observer responded, "Some people think that adults learn best by doing. To learn you don't have to sit down for four hours to read. You

> need to see it is practical. When you see someone chock in a restaurant, you see the need to learn chocking." George turned to the onlookers (Robert, Rick, and Mac) and said, "Boy, that is a relief. Maybe I'm not too old to learn."

After one skill demonstration George and his partner Charlie, who worked at the same bank, finished early and returned to their seats. They talked about using face masks when teaching first aid. Charlie said, "What about face masks?" George said, "We'll use them when we certify." "But we aren't authorized to use them when we certify," replied Charlie. George responded, "Sam and those guys aren't going near someone without a mask so we have to teach them how to use them." Charlie said, "I guess after we certify them we can tell them about the masks." George said, "Sometimes we just have to do things our way." Charlie replied, "I'm new at this, so I play by the rules". George said, "Well I know Joe, so we'll teach a mask."

George's first practice teaching session was not interactive. He read the script in the instructor's manual word for word without paraphrasing or adding any comments. As he read, he never looked up. He only made eye contact with the class when he asked a question. He answered questions while he looked down at his feet. In his summary he told the class to "call 911 (pronounced nine-eleven) if they needed help." When he asked for questions at the end of his session, Debbie, "My phone doesn't have a number

eleven on it." George and the rest of the class laughed. He admitted he was wrong and it should be nine-one-one.

George's second practice teaching was more interactive than his first. After showing the video, he asked if anyone experienced such a situation. Mac and Charlie told their stories about farmers and soldiers and George gave an example of an experience in Southeast Asia. After the stories George told the ICs to turn in their manuals to a specific page and he began to read the action guide page word for word. He did not say the title "action guide" nor tell the class what to underline as Alice requested.

After Training

George gave the training experience mixed reviews. His description of training was "Little lengthy. Maybe because she [trainer] was paid. [Maybe if she] was not paid she wouldn't go full length." He thought Alice was a "good trainer".

George's opinion of EA improved after training. When asked about EA in the follow-up interview George said, "The more I learn about it, I've become more open minded and found they are nice people."

George taught two courses after training and offered to teach a course to the supervisors at work. He said that he liked teaching first aid, because it was a good course.

While teaching these two courses, George had problems

with some his students. Two men were reluctant to use the mannequins. George explained that he cleaned them the way he was taught to clean them. When George reminded the students that they needed to pass this course to have a job, they cooperated with him. George said, "I didn't use masks because Alice said no." Another student, unable to read the test, failed the test the first time. George read the test to him and he passed.

George taught only three people in each of these classes. He said Alice knew about it. He was surprised that it took eight hours with only three people.

Consistencies and Changes During Process

There were consistencies and inconsistencies in George's behavior and attitudes during the process. Some behaviors and attitudes changed and some did not. Some of his changes were in the prescribed EA direction and some were not.

He was consistent in his guarded opinion of EA and his manner of speaking. In the beginning and end of the process, he questioned whether the negative stories about EA were true. During his interviews and both of his practice teaching sessions, he spoke in a low soft voice while looking down at his feet.

There were instances in which George demonstrated that he changed his behavior according to the cues given in

training. His reports of handling students not wanting to use the mannequin without face masks and the student with a reading problem were consistent with what he was taught in training. Before and during training George said that he would use the masks. After training he said that he did not teach the masks because Alice told him "no". He reported after training that Alice knew he didn't have the minimum number of students for a class. This was a change because he previously taught too few students without permission.

He did not lead the second practice session according to the cues Alice gave him. He asked the ICs to share their first aid experiences. Alice told the ICs not to let the students share their experiences. He did not lead the portion on the action guides as she taught. He did not say "911" nor "action guide".

Case 5 - Ann

Female; white; 25 to 35 age range; college RN.

Before Training

Ann was a registered nurse working as an occupational health nurse at a large pharmaceutical company. She was professionally courteous, while at the same time indicating that she was very busy.

Ann described EA as an organization that helped people with basic needs. She came to EA for training because the "two other nurses were certified by EA and they wanted to

keep it [the first aid certification] the same."

Her volunteer experiences related to her work. She was a CPR instructor for another voluntary organization. She wanted to help people whenever she could, but her time was limited. She worked full time and wanted to spend her free time with her 18 month old daughter.

During nursing school, Ann took first aid courses. She frequently used the first aid skills. She claimed, "Once word is out you are a nurse, you are asked a lot."

Ann's job did not require her to teach. Her unit at work wanted another instructor and she volunteered. She liked to teach because she liked to interact with people. She taught CPR at work and assisted the other nurses while they taught the first aid course. She enjoyed the people in these classes because they wanted to learn. They voluntarily signed up for the course. Ann described her excitement while teaching in the following statement,

> People were so excited. It was suppose to be over at 7:00 p. m. and they were still there practicing at 8:00 p.m. It was like that for two separate days. I left at 8:30 p. m. and I thought it was wonderful. I didn't care. The excitement was there.

She had no formal training to be a teacher, but she was confident when she spoke about her teaching experiences. In nursing school she made class presentations and completed group field work projects which she felt were similar to teaching. Ann's teaching experience included teaching

health promotion courses to employees at work and CPR to medical personnel at a hospital.

She felt that teachers should be enthusiastic and knowledgeable. They should use visual aids, make frequent eye contact with students, and use notes as a reference, not as a script to be read. One of the toughest aspects of teaching was motivating people who didn't want to be there. She believed students were motivated to learn when the teacher related the information to the student's motives for training.

Ann planned to teach lay people differently than medical professionals. She thought that lay people needed only the basic information. She felt that for lay people too much information during an emergency situation was confusing. She planned to use different terminology when teaching lay people than when teaching medical professionals.

Ann planned to teach first aid to the emergency team members at work. They were lay people who volunteered to be trained and to help out during emergencies. She expected to teach ten first aid courses during October to all the emergency team members.

Ann thought that she could teach the first aid class without going to training. She needed to take training so she could issue EA's certificates. As a result of the

instructors course Ann hoped to: (1) know more information about first aid, (2) be able to check people off during the skills demonstrations sessions, and (3) be able to issue first aid certificates to students.

During Training

Ann was a serious and challenging participant in training. She spent time during breaks and after skills demonstration sessions talking with other ICs. Two of her conversations with other ICs provided insights about the training course and her teaching techniques. In one conversation with Larry, Ann said that she resented "being read to" and thought the training was too long since she already knew the material and how to teach. In another conversation with Robert, she said that she planned to teach her students how to use a face mask, even though Alice told the ICs not to teach face masks.

Ann did not relate well to Alice. Ann frequently challenged the prescribed first aid techniques and disagreed with Alice's statement to limit group discussions in class. When Alice corrected Ann, or offered a different opinion than Ann's, Ann shook her head sideways, crossed her hands across her chest, and pushed her chair away from the table.

Ann's nursing experience was evident during the training. She offered numerous insights about signs and symptoms of illness that she knew from her nursing career.

She used medical terms like diuretic, xiphoid, and deltoid instead of the layman's terms.

There was a change in the way Ann led her first practice teaching and her second. She began the first practice teaching session enthusiastically and confident. She left her instructor's manual on a table behind her and led the session by memory. Her style of teaching was similar to her description of a teacher before training. She asked the ICs to form a semi-circle in the center of the room which allowed her to make eye contact with everyone. She first demonstrated completely the choking maneuver, then demonstrated and explained it step by step while the ICs followed along. When she came to the step which how many repetitions should be done, she said, "The book is wrong. It says 8 to 10 times. It should be until it is ejected." Alice interrupted and said,

> "The book is not wrong. As instructors whether you like it or not you need to go by the book. Something that may not make a life or death difference, you must teach by the book. Otherwise they pick up our bad habits and we all have them."

With a look of disbelief towards Alice, Ann responded, "Okay, well forget what I said."

Ann continued demonstrating and telling the students, "Look for the xiphoid. To me it is easier than coming up from the belly button." Alice interrupted and said, "But that is not what we teach." Robert and Mac nodded their

heads and said that they were taught that way. Ann replied to Alice, "But it is easier. And what if you can't find a belly button." Alice said, "Go up from the belt. You must read what is in the book and shown on the film." Ann didn't say anything else nor look at Alice. She watched the ICs while they demonstrated the skills according to Alice's cues. In closing, Ann asked ICs for questions or to talk about their experiences. George and Charlie told about their experiences related to the topic.

Ann began her second practice teaching session with a less upbeat and enthusiastic voice. She held the book in front of her and slowly read the steps word by word. She infrequently looked at the ICs and never looked Alice in the eye. While reading she became confused which side of the page to read. She did not specifically say the words "action guide" nor "911". At the end of her session she did not ask for questions or comments. Alice did not correct Ann during the second practice teaching session. Ann taught the second session, with the exception of language usage, the way Alice modeled.

<u>After Training</u>

Ann's opinion of her training experience, was not favorable. She said,

> I didn't care for the instructor. Whatever you said was wrong. Everybody was corrected. Had to do it [skills] just like she said or you were wrong. She didn't like nurses. Made a remark [that she]

> didn't like nurses. Made a remark [that she] 'flunked nurses and I'd better watch what I was doing'. Found her to be intimidating and very boring.

Her opinion of the training did not taint her opinions of the organization and teaching. Her organizational description of EA was more complete after training than before training. She reported several facts about the organization. She thought teaching for EA would be fun because she liked teaching, especially lay people.

Ann did not teach any classes within 30 days after training. She planned to teach first aid to the emergency team members in October. She did not anticipate any problems in teaching the course. She described teaching the first aid course as "turning the film on and off." She said that she planned to use face masks.

Consistencies and Changes During the Process

Ann was consistent in her enthusiasm for teaching. She used professional language and skill techniques which were consistent with her nursing training. She continued to use professional terms instead of the simpler terms for lay people. Ann did not say "911" nor "action guide".

In the first practice teaching session Ann changed her skill technique after being corrected by Alice. There was a change in her approach to practice teaching from the first to the second session. In the second practice teaching session she did not add any additional material or insights

from her nursing background. She read the action guide to the ICs as Alice did on the first day.

Case 6 - Rick

Male; white; 30 to 40 age range; college degree.

Before Training

Rick was a newly hired program supervisor for a recreational department in a neighboring state. His local EA council did not offer instructors training courses, so he traveled to this site for the first aid instructors course.

He described EA as, "An humanitarian organization devoted to helping people when they have a need..." He mentioned that EA volunteers taught first aid, CPR, and water safety classes. He was interested in becoming involved in other EA activities in addition to teaching first aid.

Rick took a first aid course in college. He used first aid once when a person was hurt in a ball game. He thought first aid was important. He said, "To save a life is the best thing you can do."

When he started his new job, he discovered no one was trained in first aid. His employees were given a first aid kit but not trained to use it. Rick said, "It is something that everybody should know. I wanted to help out by doing this." He thought that the teaching experience would look good on his resume.

The idea of teaching was both exciting and anxious for him. He had neither any teaching experiences nor any educational courses. He described a good teacher as someone who was knowledgeable, interesting, patient, related well to students, and encouraged questions. He wanted to be a good teacher, but he was nervous that he might initially be shy or get upset when a student challenged him.

Rick wanted to teach as soon after the instructors course as possible. He planned to teach the employees of his recreation department. He said, "I'd like to hold the first class with our employees as soon as possible. That will also help me from getting nervous and we need it." After the first class he was willing to teach community classes for EA.

Rick was looking forward to training. He hoped to learn about teaching and first aid. He wanted to be able to issue EA certificates after training.

During Training

Rick was initially shy during training. The first day he rarely spoke. He was one of the last ICs to volunteer for a practice teaching assignment. The second day he spoke comfortably with other ICs. He joined Robert, Hanna, George, Charlie, and Mac in several conversations. During skills demonstrations sessions, he and his partner worked well together and often finished early. When he finished

demonstrating skills before others, he returned to his seat, read the instructor's manual, or talked with other ICs. Once Rick and Robert talked to the observer about teaching. In this conversation Rick told the observer, "You just told George that adults learn by doing. So you need to get up there and do it."

Rick appeared nervous leading his practice teaching sessions. During both of these sessions, he stood in front of the class behind a desk holding his notebook. He read each word from his manual without any paraphrasing. He made infrequent eye contact with the ICs or trainer.

During his first practice teaching session, he interjected the words "and" and "uh", as he moved from one place in the manual to another. While leading the skills demonstration component of his practice teaching, Alice constantly whispered to him, pointers on how to conduct the session and what mistakes the ICs were making. He listened to Alice. Then he walked over to the ICs and suggested corrections to their skills. Rick complimented each person on something before he corrected them. He closed this practice teaching session without asking for questions or comments.

Rick appeared less nervous during his second practice teaching session. He stood relaxed in front of the class and did not interject "ands" and "uhs" while leading this

session. This teaching session did not include a skills demonstration. He showed the video and read the script from the manual, word for word. He did not say "911" nor "action guide", but he did tell people what to underline.

After Training

Rick was disappointed with the training. He wanted the topics to be covered in more detail. He described EA as a "good organization". He was frustrated with the difficult communication between different EA departments.

He had not taught a course, but was scheduled to teach one in three weeks to 15 of his pool staff. He did not anticipate any problems because "The manual seemed simple and explained the course step by step." He was apprehensive about teaching this first course. After his first course, he wanted to teach a community course for EA.

His plans to teach required two course adaptations. He wanted to teach 15 people and combine an advanced CPR course with the first aid course. The negotiations with EA about the changes frustrated him. The two EA departments involved in the decision did not communicate with each other. After several weeks and phone calls, he was granted permission to make the changes.

Consistencies and Change During the Process

Rick was consistent throughout the process in his motivation to teach and his nervousness about his first

teaching experience. He did not say "911" nor "action guides".

He changed the way he led and monitored the skills practice to be consistent with Alice's suggestions. His openness to discuss the course adaptations with an EA administrator indicated his willingness to teach according to EA's standards.

Case 7- Debbie

Female; white; 50 to 60 age range; college degree.

Before Training

Debbie, director of the city's recreational department, was also Nancy's (Case 3) supervisor. She was confident and assertive. "First responder" were the words Debbie used to describe the EA. She was familiar with EA's disaster and safety programs. She explained that EA's revenue generation policy (charging a fee for each per person in the class) was confusing to other agencies and the general public.

Her opinion of EA was not favorable. She said, "I have more adverse reaction than positive. It is real tough to get over that first impression." This impression was partially based on the fact that she was told by her brother that EA charged disaster victims for refreshments. She was annoyed that the skills and knowledge in EA's courses were viewed as the standard for aquatic and first aid training. She said, "EA won't admit there are flaws in their

procedures. EA to me is not the be all and end all. They think they are. And that is what is so disturbing to me."

She had no volunteer experience with EA, nor any other voluntary organization. Her anticipated relationship with EA was strictly business. She explained that she allowed EA to use her pools at no charge and she expected to teach her staff first aid at no charge. "I can let them have the use of my pools and they can train our people at no cost. It is a trade-off", declared Debbie. She did not expect to be charged a per person course fee when she taught her staff.

Debbie originally took first aid and CPR courses in college. She renewed her certification in these courses every few years since college. She was experienced in "common sense" first aid. These were sprained ankles and cuts on the playgrounds and community centers.

Even though Debbie's staff was not required by law to have current first aid certificates, she wanted all staff, including herself, the pool managers, ticket takers, and life guards to be prepared. She said, "Safety is the most important thing."

Debbie explained that teaching was an integral part of her recreational field. She lead staff workshops on policies, procedures, games, and arts and crafts. The goal of teaching according to Debbie was "To give a person a basic understanding how to automatically react in different

situations. It was the same goal whether someone was teaching basketball or first aid." She felt that skills became automatic, when they were learned through repetition. She tried to be a friendly, convincing, capable, and knowledgeable teacher.

Debbie tried to make learning interesting by modifying the examples to be relevant with the student's experiences. She gave students who were afraid of learning extra personal attention. She tried to have them experience early success in a learning situation.

Debbie wasn't required to teach her staff first aid. She said, "I probably could have gotten someone in the EA to teach it, but then I would have to pay out money for the lessons." She also wanted to be able to schedule the courses at a time convenient to her schedule.

Debbie planned to co-instruct the first aid course with Nancy. She was unsure how often or how many courses they would teach. She explained how she planned to teach as, "We will issue EA certificates. Give them the information to the best of my ability and practice properly, so they do it right while you watch them. You hope they do it right when they need to."

From the instructors course, Debbie expected to gain the ability to teach her staff at no cost and at a time convenient to her. She was interested in "learning in

general." She wanted to know how to present material in an "interesting and well received" manner. She wanted to hear others share their first aid experiences in order to discover whether or not their reactions were automatic or required stopping to think.

During Training

Debbie was a confident participant in training. She answered ICs' questions and appeared to listen to Alice. Debbie and Nancy, her skills demonstrations partner, laughed a lot and seemed to enjoy themselves. Debbie grasped the skills more quickly than Nancy. Together they were generally the last pair to be checked off on skills demonstrations.

Debbie volunteered to lead one practice teaching session. She led her session enthusiastically and confidently. She stood in the middle of the room where she could see everyone, with one hand relaxed in her slacks pocket and the other casually holding the book. She frequently looked at the ICs, while she read from the book. She began the skills demonstration by calling the mannequin "matilda". Everyone laughed. This informal and cheerful atmosphere continued as the ICs completed the rest of her session. During the session Debbie said "911" and "action guide" and instructed ICs to underline certain phrases in

the action guide. Alice did not correct Debbie during or after her practice teaching.

After Training

Debbie's opinion of the training was mixed. Her description of training was, "Too long and boring. She lectured all the time. The practice sessions were good."

Her opinion of EA did not improve during the process. After training, when Debbie called the EA office to schedule a course, she discovered that she was required to pay a student fee for each person in her course. She was surprised and angered about the cost. She said, "Who do they think they are? Now they say they'll charge me $15.00 per person, when I teach. We just had budget cuts. I don't have $1,500.00." She was trying to find a solution to the course fee problem. "I'm working on the costs with my supervisors. I want to charge $75.00 per hour for each pool and see what they say about that."

Debbie did not teach a first aid course within 30 days after training. She hoped to teach as soon as she worked out the fee problem.

Consistencies and Changes During the Process

Debbie's style of teaching remained the same throughout the process. She entered training accepting EA's desired standards. During training she said "911" and "action guide". Her expectation of a trade-off relationship with EA

did not change. EA's willingness to accept the terms of this expectation changed.

Case 8 - Charlie

Male; white; 25 to 35 age range; high school graduate.

Before Training

Charlie was a new security officer in the same bank as George (Case 4). He was recently retired from the Marines, where he was a prison guard.

He was familiar with EA and listed the major services that EA offered. He said, "EA was a voluntary organization to help in disaster situations; [teach] community classes; helps all around the world."

Charlie said that being an EA first aid instructor would be his first volunteer experience since returning from the Marines. He felt that serving as a volunteer instructor was important. He said, "It is worth giving my day off just to know I can give someone some information that can help someone who needs it."

Charlie took first aid and CPR courses in the Marines. He treated heat exhaustion and bleeding emergencies regularly in the Marines. One of his duties as a prison guard in the Marines was to teach prisoner rehabilitation classes. He said that the guards weren't trained to teach. They were given a list of what to tell the prisoners to do and not to do. He explained that the prisoners weren't

allowed to ask any questions in these classes.

Charlie was not required to teach first aid at the bank. One day when supervisor asked for a volunteer to teach the first aid course, he volunteered. He thought, "The satisfaction of giving the knowledge to someone else and seeing someone learn something new is worthwhile and rewarding."

He was excited about teaching. He wanted to be a good teacher who was humorous, patient, and respectful his students. Charlie described certain situations that he might encounter as a teacher. He knew that there were "Stubborn people at work who didn't listen to anybody." When they disagree with him, he planned to ignore them, repeat the material, and teach the skills as he was taught. Unlike teaching in the Marines, he expected to be asked and to answer students' questions.

Charlie planned to teach first aid classes at work and at his Baptist church. At work he expected to teach three or four people per class. These people were required to take the course. He would teach a class at work when his boss told him to teach. He didn't know how many people from the church would sign-up for the course. It would be offered as an optional training to all the nursery workers. His church training was planned for a Saturday in the Fall.

Charlie's expectations of training were, "To go to

training, learn first aid, do what they tell me, and get certified." He thought the first aid information might be interesting even though he already knew a lot about first aid.

During Training

In the general sessions, Charlie volunteered answers to ICs' questions and easily completed his skill demonstrations. He listened carefully to Alice and did what she said.

George was his partner for the skills demonstration sessions. They usually finished their sessions early and talked with each other about first aid or work. George and Charlie talked about using face masks during training (See Case Study 4). Charlie told George that he was disappointed Alice said not to teach face masks. George told Charlie that they were going to teach face masks anyway.

Charlie led one practice teaching session. He stood in the middle of the room to the right of the trainer's table with his manual on the table, so that he could glance at it. His stance was the military at-ease stance with his hands behind his back. He began by showing a video. During the video, Larry tied a 4 inch wide bandage over his eyes. After the video, when Charlie turned the lights on, the class laughed at Larry whose eyes were covered with the bandage. Charlie ignored Larry and asked the class to

resume their positions for skills demonstration. During this, Charlie walked around the room monitoring the ICs, as Alice had demonstrated. Charlie checked everyone as successfully demonstrating the skills and asked them to return to their seats. He led the part on the action guide, the way Alice demonstrated. He said the words, "911" and "action guide". He instructed the ICs which lines to underline in the action guide. Charlie asked the class for a definition of shock. Robert, Nancy, Debbie, and Ann answered his question. He asked the ICs if they had any questions, but did not ask them to share any experiences with the topic. Charlie repeated the important points of the session, thanked everyone, and returned to his seat.

After Training

Charlie said that the training was "a little long, but that he learned a lot." His opinion of EA remained positive.

He did not teach a course 30 days after training nor had one scheduled. He planned to teach at work when he was asked to teach. His church class would be in the Fall. He did not expect any problem in teaching.

Consistencies and Change During the Process

Charlie remained committed to teaching first aid classes at his work site and his church. He would teach a class when it was requested.

During his practice teaching session, he demonstrated a change from his previous style which did not allow any questions to a style that encouraged people to ask questions. He said "911" and "action guide" during his practice teaching session.

In a conversation with George about face masks during training, George indicated that he would teach the way George wanted even though it was against EA's cues. After training Charlie did not say that he planned to teach with face masks.

Case 9 - Larry

Male; white; 35 to 45 age range; masters degree.

Before Training

Larry, a self described important and busy man, was director of campus recreational buildings, trips, and programs for a state university. He describe EA's teaching and disaster activities in detail. He was annoyed that EA required him to take training. He said, "I think taking training is a is a waste of my time."

He was previously a volunteer CPR instructor for EA. His certification to teach expired three years ago when he did not return the required course record forms. He was not currently involved in any community activities.

First aid was something that Larry thought everybody should know. He took a first aid course while in college

and used first aid skills routinely. Once in a restaurant, he saved a boy's life by doing the chocking maneuver. When his dad had a heart attack, he tried CPR. But, he was unable to revive him.

Teaching was an integral part of his recreational profession. He said, "Skills must be taught before someone plays a game. Teaching is telling the facts and observing practice. It is not telling them to read a book." He thought that learning should be fun.

Larry wanted to be trained an EA first aid instructor so he could teach his staff and issue EA's first aid certificates. He thought his risk liability and insurance rates would be less with his staff trained in first aid. He expected teaching first aid to be easy because: (a) first aid was all common sense, (b) EA provided clear step by step instructor's manuals, and (c) he knew how to teach.

Larry planned to teach his 100 person staff. He was unsure how often or how many courses he would teach. He planned to buy a few of EA's first aid books and have students share the books.

His attitude towards training was not positive and his expectations minimal. He said,

> I don't really have anything I want to learn. I kinda think the two days will be a waste of time, because I have been in the education field for 20 years. What can they teach me? I just want to be able to issue their certificates.

During Training

Larry was a disruptive member of training. He did not volunteer for a practice teaching assignment nor answer questions. Alice assigned him the two remaining practice teaching session that no other IC chose. He needed extra coaching from other ICs and Alice to successfully complete his skills demonstration. Other ICs cooperated with him when necessary but did not talk with him during breaks nor lunch. They did not ask any questions nor volunteer any additional information during his practice teaching sessions. They usually ignored his antics or sighed about them disapprovingly.

In the beginning of the course Larry was quietly disruptive. He put his head down on his desk and looked out the window. On the second day, after a morning skills demonstration, he turned to his partner (Ann) and said,

> I can't believe we are having to go over all of this. It is a waste of time. All we need is the book and we can read. There are other things that I need to be doing in my office [rather] than sitting in here for two days.

In another conversation, Larry told Ann that he planned to teach 20 students in one class and share the first aid books. On the afternoon of the second day on two different occasions, Larry tied bandages around his head covering his eyes and ears.

His first practice teaching was the introduction to the

basic course first aid course. He stood behind the trainer's desk with his notebook on the desk in front of him. He used the manual as a reference. He did not read it word by word. He spoke without hesitation or nervousness in his voice.

He did not conduct his second practice teaching session as Alice expected nor the book prescribed. He taught only the first half of his two session assignment, denying he was asked to teach the second part. He resumed the same position in front of the class as he did for his first session. According to the manual, the session was to begin with a video. Larry began by saying, "Lets just pretend I showed you the film". He asked his fellow ICs if they had any "war stories" about this topic. No one responded or said anything. He told the group to turn to the page in the manual for the action guide. He did not say the words, "action guide" or "911", nor did he instruct the ICs which phrases to underline in the action guide. He closed the session without asking for questions.

<u>After Training</u>

Larry's opinions of the instructors course and teaching for EA were not positive. About the course he said, "Too long, total waste. I'm so mad I feel like not teaching." He described teaching for EA as, "Too stressful. Getting all the equipment and supplies is no fun. Who needs that?

I get that on the job. I don't need that in my spare time."

He did not teach any courses 30 days after training. He planned to teach at least one course, so he wouldn't have to go through the instructor training again. He planned to adjust the class size to include more students than EA recommended and to have students share the first aid books.

Consistencies and Change During the Process

Larry's behavior in training was consistent with his negative attitude about training. He was disruptive and inattentive. He taught confidently as expected from his description of himself as a teacher.

He changed his first aid techniques to meet EA's standards during the skills demonstrations sessions. He showed no evidence of changing his teaching techniques. He did not say "911" nor "action guide". He planned to teach against EA's rules about class size and student books.

Case 10 - Mac

Male; white; 35 to 45 age range; masters degree.

Before Training

Mac was a regional sergeant in the state park system. On his uniform he wore EA's first aid patch. He described EA as, "A service organization set up to help people with needs, whether those be medical, emergency, or otherwise." He knew about EA's activities in first aid, swimming, and disaster.

Mac was formally trained and vastly experienced in first aid. He was trained as an EMT and previously served on an ambulance squad. He routinely used first aid in his job, including doing CPR four times. He described giving someone first aid as "A tremendous feeling. One of the few times you aren't down in the dumps. It is like a quick high."

Mac explained that his first aid experiences lead him into teaching. Mac taught CPR for another voluntary organization and was an "expired" instructor for EA. He let his authorization expire five years ago because he didn't have the time to teach. When Mac took his current job assignment, his boss knowing that he was as an EMT, made teaching first aid and CPR part of Mac's job description.

He liked teaching for a number of reasons. Through teaching he kept his first aid skills current and traveled to other state parks to train people. He enjoyed teaching people something useful. He said, "If you can teach someone to save a life, it is really enjoyable."

Mac tried to be an enthusiastic, knowledgeable, and interesting teacher. He constantly asked students for suggestions and reviewed his former students' tests for common errors. These errors illustrated to Mac what he should emphasize in the next course.

Most of the students Mac taught were required as a job

requirement to take a first aid course. Mac tried to make the course interesting by explaining that the skills learned could help their families as well as people at work. Many of his students failed the CPR test the first time because they didn't practice the skills. He said that he didn't like to fail people. He worked with them and re-tested them until they passed.

Mac planned to teach first aid to 70 park rangers in different parks across the state. He knew about EA's rules on class size and costs and anticipated a problem. He explained that his class sizes were either too large or too small. When he went to a park he taught whomever needed it regardless of the number. He used one adult and one baby mannequin regardless of the size of the class. The students shared the books. He knew that EA was trying to impose a $15.00 per person course fee and that the state wouldn't pay it. He didn't know what he was going to do about the cost. The officers were required to have first aid and he was required to teach it.

Mac signed up for training because he was required by law to issue EA first aid certificates to his students. He wanted to learn more about teaching. He said, "I'm just 'John Q' public teaching out there." He wanted suggestions to make the course interesting and to help students with learning problems.

During Training

Mac was an active, confident, and helpful member of training. He frequently answered ICs' questions and helped his fellow ICs with first aid skills. He helped Nancy with her skills and talked with Robert, Hanna, and George. Mac was the only IC to ask questions about adapting EA's rules for his particular situation.

Mac lead his two practice sessions confidently and enthusiastically. He stood relaxed in front of the room and made frequent eye contact with the ICs. His manual was on the table to his right, but he never referred to it while teaching.

His first session was the introduction of a test. He stood in front of the group smiling, with wide bright eyes, and made good eye contact with everyone. He tried to build the IC's confidence about taking the test by saying, "You all did well on the practice session so you'll probably do well on the test".

He led his second practice teaching session confidently without referring to the manual. He demonstrated the skills step by step and asked the ICs to complete a practice session at their own pace. Alice corrected him and told the group to do the skill one step at a time. He agreed and asked people to slow down when they were getting ahead of him. He tried to make people feel comfortable, by saying

that the ICs were confusing him by going too fast. He told Robert, "You are getting ahead of me. Will you back up where you belong?" To Larry he said, "You get back up there [previous skill step] where you belong. You are confusing me." He told Charlie, "Don't do a push-up on George." The ICs laughed at Mac's comments and did what he asked. Each time Alice's corrected Mac, he thanked her and immediately did what she directed. He closed the session by a summary and asking for questions.

There were no action guides for either of his practice teaching sessions. He correctly substituted "911" for "EMS".

<u>After Training</u>

Mac described training as, "long, but necessary". He was disappointed that he didn't learn anything new about teaching. He compared EA's bureaucratic processes to those of the state. He said, "EA has as many rules as the state. They can be worked around like the state rules."

Mac said that he talked with Alice about his class sizes. She agreed that he could teach the smaller classes (less that six), but not the larger ones. He was unable to reach agreement about the cost per student fee for the course. He said that he was going to let his boss and EA work it out.

A week after training Mac was seriously injured in an accident so he did not teach any courses. He did not plan

to teach any courses until the winter. He said, "The summer was the busy law enforcement and grass cutting season and winter was the teaching season."

Consistencies and Change During Training

Mac was consistent in his confidence about teaching and commitment to teach. He confidently negotiated with Alice to get an exception to the class size rule. He spoke confidently about his ability to get around any other of EA's rules. Although he did not teach a course 30 days after training, he planned to teach several courses in the winter.

He responded to cues from Alice about how to lead the skills demonstration session by teaching as she instructed. He used correctly substituted "911".

Summary

Descriptions of the training event, principal transactions, group interactions during training, EA officials, and case studies of ICs provided contextual information to aid in the understanding of findings about the transactions that occurred during the socialization process. In the case studies of ICs similarities and dissimilarities in ICs' pre-training characteristics, training behavior, and post-training feelings and behavior were revealed. These insights and observations provided a data base for the categorization, analyses, and findings about training as a socialization process presented in

chapters 5, 6, and 7.

The definition of socialization provided the framework for chapters 5, 6, and 7. Socialization was defined as a process by which individuals are encouraged to invest in roles requiring conformity. The components of the socialization process i.e. (the presocialized characteristics and the nature of training) and the ICs' feelings and behaviors (i.e. indicators of socialization) after training were examined to gain an understanding of the process. The categorization, analyses, and findings about these components are presented in the following order: chapter 5 - ICs' presocialized characteristics, chapter 6 - socialization dimensions during training; chapter 7 - socialization dimensions after training; and chapter 8 - ICs' and officials' expectations of the socialization process.

CHAPTER 5

ICS' PRESOCIALIZED CHARACTERISTICS

ICs' presocialized characteristics were their personal characteristics relevant to teaching the first aid course. The categories of these characteristics emerged from analyses of the pre-training interviews. These categories were: expectations from training, background to teach first aid; relationship with socializing agent, EA; and self-interests.

ICs' Expectations From Training

ICs' expectations from training were provided through their statements about their objectives for training and their feelings about mandatory participation in training.

Objectives For Training

ICs' objectives for training indicated how much they wanted to gain from training. As shown in Table 3, Hanna, Nancy, and Rick were the ICs who wanted to gain the maximum amount from training. They wanted to be certified, learn about first aid and teaching, and how to get answers from EA to their questions. Certification meant that the ICs would be able to issue EA first aid certificates to their students. Larry wanted to gain the least from training. His only objective was to be certified. Robert, George, Ann, Debbie, Charlie, and Mac were interested in gaining certification, plus learning about either first aid or teaching, but not both. There was a pattern between Nancy's

Table 3

ICs' Objectives From Training

Objectives	Cases	Illustrations
HIGH:		
Ability to issue certificates, learn first aid, learn how to teach, get answers to my questions	Hanna, Nancy, Rick	"Be certified. I hope to gain a better understanding of the new stuff and the past. I want an answer at the end of the phone." (Hanna)
		"Get certification. Knowledge in first aid is most important learn about teaching; answer questions." (Rick)
MODERATE:		
Ability to issue certificates and learn first aid	George, Ann, Charlie,	"I want more information than you get in the basic class. The ability to check people off myself. Be able to certify." (Ann)
		"I'll go to training; learn first aid; do what they tell me; get certified." (Charlie)
Ability to issue certificates and learn how to teach	Robert, Debbie, Mac	"We will issue EA certificates. How to give them the information to the best of my ability, practice properly." (Debbie)
		"Get their certificates. I'm just John-Q layman public teaching out there. I'd like some help." (Mac)
LOW:		
Ability to issue certificates	Larry	"Be able to issue certificates. I don't really have anything I want to learn. I think 2 days will be a waste of time." (Larry)

and Rick's scores on background pertinent to teaching first aid and their objectives for training. They had low scores on background pertinent to teaching first aid and high scores on objectives. The pattern between Hanna's high background to teach first aid and high objectives for training was not the same as Nancy's and Rick's pattern.

Feelings About Training

ICs' held different feelings about being required to take training. These feelings are listed in Table 4. Hanna, Nancy, and Rick had high positive feelings about training. They were excited about training and wanted to gain more from training than certification. Robert, Ann, Debbie, George, Charlie, and Mac were moderate in their positive feelings about training. They hoped to learn something, but didn't think training was necessary for them to be a successful instructor. Larry was the least positive about training. He was negative about EA requiring training. He did not think training was necessary for him to be a successful instructor.

Scale of Training Expectations

ICs' objectives and feelings were combined into a scale of training expectations. As shown in Table 5, there was a consistent pattern on expectations for training among ICs. Hanna, Nancy, and Rick, who scored high on objectives and high on feelings, had high expectations for training.

Table 4

ICs' Positive Feelings About Training Before Training

Positive Feelings	Cases	Illustrations
High	Hanna, Nancy, Rick	"I'm giving up two vacation days to take this training. This is much more important to me." (Nancy) "Should be interesting." (Rick)
Moderate: positive, but thought they didn't training to be able to teach	Robert, Ann, George, Mac, Debbie, Charlie	"That [taking training] doesn't mean anything as far as I'm concerned, but it will qualify me to certify people at work. Don't mind going through the course again. In fact I kinda enjoy doing it every now and then." (Robert) "I just want more information that you get in the instructors class. I think I could check them off now I just need the certification." (Ann)
Low	Larry	"I think taking a three day course [one day basic course and two days instructors course] is a waste of my time. But, I think it would be nice to be able to hand out certificates." (Larry)

Table 5

ICs' Expectations From Training

Scale	Cases	Evidence
High	Hanna, Nancy, Rick	Wanted to gain certification; learn about teaching and first aid; get questions answered; and expressed positive attitude about training
Moderate	Robert, George, Ann, Debbie, Charlie, Mac	Wanted to gain certification; learn first aid; and expressed a positive, but qualified, attitude about training
Low	Larry	Only wanted to gain certification and expressed negative attitude about training

Robert, George, Ann, Debbie, Charlie, and Mac, who had moderate objectives for training and moderate feelings about training, had moderate expectations for training. Larry scored low on objectives, feelings and expectations.

ICs' Background Pertinent To Teaching First Aid

The ICs' backgrounds pertinent to teaching first aid were indicated through their statements about their training and experience in the area of teaching and their training and experience in the area of first aid.

Background in Teaching

ICs' had different backgrounds in teaching. As shown in Table 6, Robert, George, Ann, Larry, and Mac were trained and experienced in teaching CPR for another organization. CPR is an advanced first aid skill. Hanna was experienced teaching courses for EA. Debbie and Charlie taught classes on subjects other than first aid in their jobs. Nancy and Rick said they had no teaching experience.

Hanna, George, Larry, and Mac were previously trained to teach for EA. Hanna stopped teaching for EA when she needed to work for money. George's Larry's and Mac's authorization to teach expired several years ago when they did not meet EA's standards for teaching. Hanna, George, Larry, and Mac scored low to moderate relationship with EA. Debbie was the only IC with a low or moderate relationship with EA who was not formerly an EA instructor.

Table 6

ICs' Background In Teaching

Background	Cases	Illustrations
	Teaching Experience In Other Organizations	
Trained and experienced CPR and EMT classes for another organization	Robert, Hanna, George Ann, Larry, Mac	"I taught EMT courses. I am a CPR instructor for another organization." (Robert) "I was qualified as a CPR instructor for another organization." (Ann)
Trained and experienced in teaching content other than first aid	Debbie, Charlie,	"My field is recreation. We have two days [of training] where we go through policies, procedures, and how to conduct learning games." (Debbie) "In prison we had to teach the prisoners classes to rehabilitate them." (Charlie)
Not trained nor experienced in teaching	Nancy, Rick	"I don't know how to teach. I am not a teacher." (Nancy) "In my health care degree there wasn't anything to help me feel comfortable teaching." (Rick)
	Teaching Experience In EA	
Expired authorization to teach first aid for EA	Hanna, George, Larry, Mac	"I needed to work for pay so I didn't teach any more and [my authorization] expired."(Hanna) "I lost my instructor rating. Where I work, it is really difficult to teach the number they need for classes." (George)

Background in First Aid

The ICs' background in first aid was shown in Table 7. Robert, Hanna, Ann, and Mac were trained and experienced in medical first aid. They frequently used their first aid skills. George, Charlie, Debbie, and Larry were trained in basic first aid and used the skills occasionally. Nancy and Rick had basic first aid training and infrequent practical application of the skills.

Scale of Background To Teach First Aid

In order to reflect the ICs' backgrounds pertinent to teaching first aid, their statements about their training and experiences in teaching and first aid were combined. The scale of ICs' backgrounds pertinent to teaching first aid is revealed in Table 8. Robert, Hanna, Ann, and Mac entered training with high backgrounds pertinent to teaching first aid. George, Debbie, Charlie, and Larry had moderate backgrounds pertinent to teaching first aid. Nancy and Rick entered training with minimum background pertinent to teaching first aid. The majority of ICs entered training with high or moderated backgrounds pertinent to teaching first aid.

There was a similarity between the ICs' teaching and first aid backgrounds. The ICs with the most teaching background Robert, Hanna, Ann, and Mac also had the most first aid background. Nancy and Rick, the ICs with the

Table 7

ICs' Background in First Aid

Background	Cases	Illustrations
Medical first aid training and frequent life saving first aid experiences	Robert, Hanna, Ann, Mac	"We put in anywhere from 40 to 60 hours a month on the ambulance." (Robert) "I've used CPR four times in my profession." (Mac)
Basic first aid training and occassional common sense first aid experiences	George, Charlie, Debbie, Larry	"I think the worse we had was one lady with her hand caught in the elevator door." (George) "I've had a few common sense type first aid experiences." (Debbie)
Basic first aid training and infrequent common sense first aid	Nancy, Rick,	"I've had first aid in the past. We haven't had a lot of problems." (Nancy) "People got hurt playing ball. I did a little first aid, not much." (Rick)

Table 8

ICs' Background To Teach First Aid

Background	Cases	Evidence
High	Robert, Hanna, Ann, Mac	Trained and experienced in teaching first aid content; trained and experienced in medical first aid; and frequently used advanced first aid skills
Moderate	George, Debbie, Charlie, Larry,	Trained and experienced content other than first aid and occassional practical first aid experiences
Low	Nancy, Rick	No training nor experience with teaching and infrequent practical first aid experiences

least teaching background, had the least first aid background. There were patterns between some of the ICs' expectations and their backgrounds pertinent to teaching first aid. Robert, Ann, and Mac had moderate expectations for training and high backgrounds pertinent to teaching first aid. Nancy and Rick had high expectations and low backgrounds pertinent to teaching first aid. Hanna had high expectations and a high background pertinent to teaching first aid. George, Debbie, and Charlie had moderate expectations and moderate backgrounds pertinent to teaching first aid. Larry had low expectations and moderate background pertinent to teaching first aid.

ICs' Relationship With EA

Analyses of ICs' descriptions of EA's organizational goals and specific procedures revealed subtle differences between ICs' feelings about EA and their concerns about teaching.

Feelings About EA As An Organization

All ICs had an opinion about EA as an organization. As indicated in Table 9, ICs, except for Hanna and Mac, expressed either positive or negative feelings about EA as an organization. Hanna and Mac described mixed feelings about EA. Robert, Nancy, Ann, Rick, and Charlie, made positive statements about EA's activities. They felt that EA was a "worthwhile organization". George, Debbie, and

Table 9

ICs' Feelings About The Socializing Agent

Feelings	Cases	Illustration
Positive: proud of EA's activities to help people	Robert, Ann, Nancy, Rick, Charlie	I am very proud to be associated with the EA." (Robert) "An organization that helps people with basic needs." (Ann)
Negative: not proud of some of EA's activities	George, Debbie, Larry	"In the service there was some bad stuff about EA. I was a little uneasy about taking this course." (George) "I've never worked for EA before. I have had more adverse reactions than positive." (Debbie)
Mixed: both positive and negative comments	Hanna, Mac	"EA is there to help someone in need. EA is a fantastic organization in that [way] I am very proud of EA. There is the big business side that I am not proud of." (Hanna) "EA doesn't like that but the state isn't going to pay $15.00 per person. I understand their viewpoint. It is a catch 22 situation." (Mac)

Larry made negative statements about EA as an organization. They did not like what they knew about EA's activities.

Concerns About Teaching For EA

ICs with both positive and negative feelings about EA as an organization expressed concerns about teaching for EA. As shown in Table 10, only Charlie expressed no concern. Robert, Nancy, and Rick were concerned about their personal ability to teach. Hanna, George, Debbie, Larry, and Mac were concerned about specific EA procedures or rules. ICs expressed concerns about situations in which EA imposed standards or rules that they did not like. George, Debbie, and Larry had negative feelings about EA's organizational activities as well as concerns about EA's rules.

Scale of ICs' Relationship With EA

A scale of ICs' relationships with EA was developed by combining ICs' statements of feelings about EA as an organization and their specific concerns about teaching for EA. As shown in Table 11, there were similarities and differences among ICs in their relationship with EA prior to training. Robert, Nancy, Ann, Rick, and Charlie scored high on their relationship with EA. They felt positive about the organization and had no organizational concerns about teaching for EA. Hanna and Mac were moderate in their relationship with EA. They had positive feelings about EA's activities and concerns about EA's rules for teaching.

Table 10

ICs' Concerns Before Training

Concerns	Cases	Illustrations
Focus of concern is EA's rules	Hanna, George, Debbie, Larry, Mac	"As a volunteer, all of these hours training...and you can't take the responsibility for not passing that person." (Hanna)
		"I teach only a couple of students at a time. I have to. But don't tell them [EA] that." (George)
		"EA won't admit there are flaws in their procedures. EA to me is not the be all and end all. They think they are and that is what is so disturbing." (Debbie)
		"I think having to take it [first aid instructors course] is dumb. We'll probably buy some books and share them." (Larry)
		"We've bought the books, mannequins, films at a one time cost...and they [EA] are making waves about that. We do it their way or they aren't going to certify us." (Mac)
Focus of concern is self	Robert, Nancy, Rick	"The biggest obstacle that I face is feeling a little inadequate myself." (Robert)
		"I don't know how to teach. I am not a teacher." (Nancy)
		"I'd like to teach as soon as possible. That will help me from getting nervous." (Rick)
No concern	Charlie	"Can't think of anything. It's all new for me." (Charlie)

Table 11

ICs' Relationship To The Socializing Agent, EA

Scale	Cases	Evidence
High	Robert, Nancy, Ann, Rick, Charlie	Positive statements about EA and no organizational concerns about teaching for EA
Moderate	Hanna, Mac	Mixed feelings about EA and concerns about some aspect of teaching for EA
Low	George, Debbie, Larry	Negative statements about EA and concerns about some aspect of teaching for EA

George, Debbie, and Larry scored low on their relationship with EA. They had both negative feelings about EA's social activities and concerns about EA's rules for teaching. Understanding the ICs' self-interests for teaching helps to understand how the ICs, with mixed or negative feelings about EA, participated in training.

ICs' Self-interests

IC's self-interests were reflected in their statements about their plans to teach and their perceived benefits from teaching.

Plans to teach

ICs planned to teach first aid classes in different locations. As revealed in Table 12, Hanna was the only IC who planned to teach all community courses. These were courses unrelated to paid employment. Ann, Debbie, Larry, and Mac planned to teach only at the place where they were employed. Robert, Nancy, George, Rick, and Charlie planned to teach at work and in the community.

Benefits

There was a similarity in ICs' plans to teach and their perception of the benefits from their teaching. The benefits ICs perceived from teaching were listed in Table 13. Ann, Debbie, Larry, and Mac mentioned that teaching benefited themselves. They felt that teaching might help them get a promotion or helped them to remember the material

Table 12

ICs' Plans For Teaching First Aid Classes

Location	Cases	Illustrations
Community Classes Only	Hanna	"I called Alice and said if you need a volunteer [to teach] I would like to do it. So they started setting up classes for me." (Hanna)
At Work Only	Ann, Debbie, Larry, Mac	"I'll teach emergency team members at our three plants." (Ann) "I'll be teaching any staff who need it, in the time I set aside, my work time." (Debbie)
At Work and in the Community	Robert, Nancy, George, Rick, Charlie	"I'll teach to my summmer employees. Knowing EA, from my past experience they will call and say they need something [to teach a community class] and I probably will." (Nancy) "I teach guards at the federal reserve bank. I think this time I'm going to make a point to teach one like they want, so I don't have to do this again [take instructors course]. I wouldn't do [teach] it at the bank, but EA's office." (George)

Table 13

ICs' Perceived Benefits From Teaching

Benefits	Cases	Illustrations
Benefits to self	Ann, Debbie, Larry, Mac	"I want my staff 100% trained to help cut down on my liability." (Larry) "I enjoy teaching now because through teaching I retain it [first aid] a lot better." (Mac)
Benefits to self and others	Robert, Hanna, Nancy, George, Rick, Charlie	"One life saved is worth all the effort you will ever put in it." (Robert) "It is worth giving my day off just to know I can give someone some information that can help." (Charlie)

better. They were the ICs who planned only to teach at work. Robert, Hanna, Nancy, George, Rick, and Charlie said that teaching helped others as well as themselves. They were not specific about how teaching helped others. Rick's statement, "It is something everybody should know" was representative of other ICs' comments. ICs who mentioned a duality of benefits, benefits for self and others, were the ICs who planned to teach classes in the community.

Scale of Self-interests

By combining ICs' plans to teach and perceived benefits, a scale of ICs' self-interests was developed. As revealed in Table 14, Ann, Debbie, Larry, and Mac scored high on self-interests. They planned only to teach at work and mentioned benefits of teaching only to themselves. Nancy and George scored moderate on the self-interest scale. They expressed the possibility of teaching a community class sometime in the future and mentioned benefits to others, as well as themselves. Robert, Hanna, Rick, and Charlie scored low in self-interest. They had definite self-initiated plans to teach community classes and mentioned benefits to others, as well as to themselves.

Summary

Similarities and distinctions between ICs emerged when patterns across categories of presocialized characteristics were examined. As shown in Table 15, Hanna and Larry

Table 14

ICs' Scale of Self-Interests

Scale	Cases	Evidence
High	Ann, Debbie, Larry, Mac	Planned to teach only at work and stated benefits only to self
Moderate	Nancy, George	Planned to teach at work and in a community class sometime in the future and stated benefits to self and others
Low	Robert, Hanna, Rick, Charlie	Demonstrated initiative of teaching classes in the community and stated benefits to self and others

Table 15

Summary of ICs' Pre-training Characteristics

Case	Expectation	Background To Teach First aid	Relationship With EA	Self-Interest
Robert	Moderate	High	High	Low
Hanna	High	High	Moderate	Low
Nancy	High	Low	High	Moderate
George	Moderate	Moderate	Low	Moderate
Ann	Moderate	High	High	High
Rick	High	Low	High	Low
Debbie	Moderate	Moderate	Low	High
Charlie	Moderate	Moderate	High	Low
Larry	Low	Moderate	Low	High
Mac	Moderate	High	Moderate	High

emerged distinct from the rest of the group and opposites from each other on expectations and self-interests. Hanna and Ann were similar in their backgrounds pertinent to teaching first aid and opposite in self-interests. Nancy and Rick were similar in most of the presocialized categories. They differed only in self-interests, evidenced by Rick's demonstrating initiative in planning a community course and Nancy's statement that she might teach one, if asked.

There was a pattern of similarity among ICs' expectations for training and backgrounds pertinent to teaching first aid. Nancy and Rick had high expectations for training and low backgrounds pertinent to teaching first aid. With the exception of Hanna, ICs with high backgrounds pertinent to teaching first aid stated moderate or low expectations from training.

How the ICs' presocialized characteristics guided their behavior during training is understood by comparing the findings about their presocialized characteristics to the findings about the nature of training. The socialized dimension of the nature of training and ICs' responses during training are presented in chapter 6.

CHAPTER 6

SOCIALIZATION DIMENSIONS DURING TRAINING

The training event was analyzed to determine the nature of the content transmitted and the ICs' and trainer's participation during training. From this analysis findings about the ICs' progress during the socialization process were discovered.

Nature of the Socialization Content Transmitted

The content components of the socialization process studied were the behavioral cues about instructor identity and responsibilities and how these cues were delivered. Behavior cues given by the trainer depicted the prescribed behavior and the identity of EA instructors. Instructor's responsibilities were behaviors that instructors were expected to perform. The consistency, reinforcement or contradiction, of these cues provided insights into differences between the ideal and operating practices of EA instructors.

Instructor Identity

Four categories of cues pertinent to identity of EA instructors were discovered. These were cues about how the ICs should represent EA when they teach. They are indicated in Table 16. The audio-visual presentation, Alice's statements, and organizational documents reinforced these cues.

The narrator in the slide series said that instructors

Table 16

Cues Given To ICs About Being An EA Instructor

Category	Descriptions	Time Spent On This In Training	Consistency of Cue
Identity of Instructor	Do not charge for your time	10 minutes	yes
	Limited area of authority	25 minutes	yes
	Volunteers are valuable	20 minutes	no
	Represent the organization as you teach	5 minutes	no
Instructor Responsibilities	Communicate with EA through written forms	65 minutes	yes
	Teach the standardized course as written and without ommitting anything	30 minutes, reinforced during practice teaching sessions	yes

for EA were volunteers. Images presented by slides depicted instructors dressed in volunteer uniforms teaching first aid classes. A poster in the EA building depicted a man dressed in a volunteer first aid uniform and the caption, "You may never work harder. Or get dirtier. Or get paid less. But it will be the best job you never got paid to do." These were vivid and graphic images of volunteers as innovative, effective members of EA. Alice specifically told the ICs they were volunteers in her statement, "If you are working [teaching first aid] for your company, you are a volunteer for EA." This was reinforced by the document authorizing instructors to teach EA classes. It contained two blocks, paid or volunteer staff, for the ICs to check. Alice told the ICs to check the volunteer block. The message of the voluntary nature of the EA instructor was clear and consistent.

The cue that instructors were not allowed to charge money for teaching a first aid course was repeated in the slide series, official documents, and by Alice. The narrator on the slide series said, "Volunteers are not paid money by EA for their services." Instructors were required to sign a contract specifying they would not receive money for teaching activities on behalf of EA. Alice announced, "You can't charge for your time, for money to go into your pocket. You are a volunteer for EA." Alice elaborated on

this message by telling a story about an instructor who was paid for teaching a course at a location where he was not an employee. EA discovered that he was paid and withdrew his authorization to teach first aid. In this story, the cue not to charge, as well the sanction for this behavior, was explained. If an instructor was paid for teaching and EA found out, he or she would not be allowed to teach for EA again. No ICs asked any questions, nor made any comments, about these cues.

Instructors were limited in their authority to initiate classes. Alice explained,

> You can set classes in your own company or we can assign you classes from our community classes. You can't set up a class with a group that you aren't connected to. If your neighbor across the back fence asks you to set up a class at the bank, where he works, you can't do that. Tell him to call the EA office and set it up. We don't want you to set up competition with the EA.

ICs asked no questions, nor made comments, about this limited authority to teach. A few ICs gave nonverbal indications that they were listening. Ann, Debbie, Nancy, and Rick wrote something in their notebooks after Alice's statement. Other ICs appeared to be listening by watching Alice as she spoke.

The cues about volunteer instructors contained the messages about EA's desire to control the ICs. EA will charge for the classes, not the individual instructor. EA will assign instructors to community classes. The ICs

demonstrated no reactions to these cues.

The two cues, the importance of volunteers in EA and instructors representing the organization while teaching, were not consistently presented during training. A proud history of volunteerism in EA was portrayed in the slide series and one comment by Alice. Alice said, "We have a proud history and we want everybody to know about it. We are proud of our people and services." Other cues given by Alice contradicted the message of the importance of volunteers. Alice alluded to her realistic feelings about volunteers in her statement,

> If you have spare time, give it to us. We will call you, or you may call us. When the secretary picks herself off the floor, she will assign you a course. It is not often a volunteers calls us.

In these statements Alice revealed a difference in her feelings about the ideal volunteer as represented in the slides and the operating practices of volunteers. The cues in these statements about volunteering were: it is something you do in your spare time and we don't expect you to call us. This was not the same message that the stalwart and innovative volunteer represented in the slides. ICs laughed when Alice made these comments, but they did not ask any questions, nor make any comments.

Another example of a cue about a difference between ideal behavior and operating practices of EA instructors was given when Alice told the ICs that as they taught the first

aid course they were representing EA. Alice did not wear an EA name badge nor any EA identification during the course. At the end of the course while handing out the course completion certificates, she gave each IC an EA name badge. She said, "As an EA instructor you will be a representative for us so here is a name badge for you to wear." ICs made no comments about their name badges. They treated the badges differently from their certificates. Everyone put their certificates in their wallets and commented about putting the certificate in a safe place. ICs accepted the EA name badges and put it in their EA bag with the other supplies. No one said anything about the EA name badge, nor wore it. The name badges seemed less important to the ICs than the certificates.

The cues of the voluntary nature of instructors and their limited authority were consistently presented during training. The cue of volunteers as valued members who represented EA as they taught was inconsistently presented. The image of volunteers as important members of EA presented in the slide series was not reinforced throughout training. ICs were passive recipients of cues concerning their identity as volunteers for EA. No one asked any questions, nor made any comments, after these cues.

Instructor Responsibilities

Instructor responsibilities included communicating with

EA, teaching activities, following the "book", and language usage. The amount of time spent on different cues and how the cue was delivered varied with the complexity of the cue and the importance EA placed on them.

Communicating With EA

The cues about how instructors should communicate with EA portrayed a complex and formal communication system maintained through forms to be filled out in writing. The importance of this responsibility was emphasized by the amount of time spent reviewing the forms. Alice spent two hours of the 16 hour course explaining the forms. The only aspect of training to which more time was devoted was the review of the first aid course which included practice teaching sessions and skills demonstrations sessions. The different forms are listed in Table 17.

The forms were the prescribed channel for instructors to communicate with EA about their teaching activity. Each form served as control mechanism for EA. While reviewing the forms, Alice gave cues about EA's desired control over instructors.

Alice indicated the importance of the forms in her statement, "It is your responsibility to see that you get the credit that you deserve. Job isn't done until all the paperwork is done." She explained the reason for the forms in her statements,

Table 17

Forms For ICs To Communicate With EA

Name	Purpose	Time Spent on it	Questioned or Commented on by ICs
Instructor's Agreement	Contract between IC and EA	10 minutes	no
Instructor's Authorization	Card signifying approval to teach a specific course in a specific location	10 minutes	no
Intent to Teach	EA's approval of instructor's plans to teach a course	10 minutes	no
Course Record	Official record of teaching activity	90 minutes	yes
Evaluation	Feedback from students to the instructor about the course	10 minutes	no

> One of the drawbacks of a large council, as instructors, you want people to know you. No one can know everybody. You are just a name in a file. We have 500 first aid instructors. Your just names and paperwork, so you have to cooperate with us."

The cues in these statements were: (a) it was the instructors' responsibility to prove what teaching activity occurred; (b) there were too many instructors to know each one personally; and (c) forms were the way to communicate with EA.

ICs were required to sign the Instructor Agreement Form. By signing the form, they demonstrated their commitment to teach the course according to EA's standards and guidelines. In the fourth hour of training, after the global overviews of EA's history and educational principles, Alice spent ten minutes reviewing this form with ICs. She handed them the instructor agreement and said, "Sign the bottom of 7777 [number reference of the form] now. Don't worry about what it means. Later, if you can't abide by it, see me and we'll talk." Everyone signed the form without asking any questions nor making comments. The form was never again discussed nor mentioned in the course. The cues given to instructors with this form were: (a) trust EA and sign the form; (b) later, if you have a problem, we'll talk; (c) if there is a problem, it will be an individual problem; and (d) most people accept these terms. The form and the way it was handled illustrated EA's expectations that

instructors accept their prescribed role and do not negotiate with EA about it. ICs behaved as EA expected, by signing the form without questions nor comments.

In the presentation of the Instructor Authorization Form, ICs were provided cues about their jurisdictional limits of teaching. Alice explained that instructors were able to teach only within this EA council's geographic area. She indicated an exception to the rule in response to Mac's comment, "I screw everything up because I teach all around the state." Alice said, "Yes, you'll screw everything up." The entire class laughed. Alice walked over to Mac and said, "I'll get with you later and tell you specifically how to do it. Yes, it messes things up. But we have a way to handle it." With this exception, Alice acknowledged a difference between the ideal and operating practices of instructors.

The nonverbal and verbal cues in this dialogue were important. In response to Mac's statement, Alice rose from her seated position behind a desk and walked across the room to stand directly in front of Mac. This movement spatially reinforced that this issue was an individualistic concern of Mac. Her physical movement did not encourage inclusion of other ICs in the discussion. Alice's response indicated an exception to this rule. It was an exception that she wanted to explain privately, thus controlling the knowledge about

the exception. No other IC, besides Mac, asked questions nor commented on the rule, nor Alice's response.

The cues reflecting EA's approval of instructor's plans to teach were given during the discussion of the Intent To Teach Form. Alice explained:

> We want an Intent To Teach Form submitted to our office three weeks in advance [of when] you will teach the course. This lets us know that you will teach. We will approve or disapprove it. We may disapprove it because the equipment isn't available or [there are] too many in the proposed class.

Mac asked, "How long will it take to hear back?" Alice said, "We'll let you know in a week or so." After Alice's statement, Mac turned to Hanna and said, "Oh sure, I'll be lucky if I have a [one] day notice." Hanna and Mac laughed to themselves about this. Ann and George shook their heads in a negative motion and muttered something to themselves. Alice responded, "We gradually will get everybody indoctrinated about this form" and moved onto the next item for presentation. Alice gave no cues about an exception to this rule. She sent the message that everyone will do as she requested. By delivering the cue to the entire group, not individually to one person, the importance and absolute resolve of the message was reinforced.

The cue indicating the number of students to be taught in one class was given during the discussion of the Course Record Form. Alice said, "The student teacher ratio is one to six." Mac interrupted Alice and asked, "What if the boss

tells you to teach three and the minimum is six?" Alice responded, "You call me. I say okay. You teach and record the date that you called me on the form. If I get a course record in and I didn't talk with you, you have a problem." Mac said, "This is a problem for me as I go to different parks." Hanna, Nancy, Rick, and George nodded their heads in agreement with Mac. Alice answered Mac by saying, "You are an exception to all our rules. I'll get with you." Hanna, Nancy, Rick, and George made written notes during this conversation. No other IC asked questions nor made comments about this cue.

The cues given during the discussion of the Course Records were: exceptions were possible; others might have a similar problem; and this was the way to acquire permission for an exception. By telling the group how the rule could be adjusted, Alice acknowledged that this might be a common problem about which EA was flexible.

Evaluation was not an area emphasized nor discussed in training. Ten minutes was spent on course evaluation. No time was spent explaining the written evaluation form nor discussing various ways to evaluate a course. Alice gave an evaluation form to the ICs at the end of class and asked them to complete it. They completed and returned the evaluation form to Alice while she was grading their final exams. Alice told ICs to complete the evaluation of their

classes in the same manner. The instructors were to distribute, collect, and read the evaluation forms in their classes. These evaluations were not to be sent to the EA.

Most ICs were passive in their reaction to the cues about how to communicate with EA. Only Mac asked questions. ICs appeared to be paying attention by nodding their heads and watching Alice during this time. There was no tangible evidence that indicated their intentions to comply with these cues nor any evidence during training that they would not comply with the cues.

Alice's attitude about ICs' acceptance of these cues was reflected in her statements:

> I've been told that I don't need to spend so much time on this. Any ole fool can fill it out. So I bore you. And if you get them back [EA returns the forms to the instructor], I'll know you weren't listening.

In this statement, Alice implied that an instructor might complete the form wrong, but not that an instructor would teach differently than prescribed.

Most of the cues about how to communicate with EA were presented as rules to be accepted not negotiated. The only flexibility in the rules emerged when Mac asked questions. Alice mentioned exceptions to the rules about jurisdiction of teaching and class size. These exceptions illustrated a difference between the ideal and the practicing instructor. Through the exceptions Alice acknowledged that only in two

situations, geographic jurisdiction and class size did she expect a difference between the ideal and operating instructor.

Whether or not Alice gave the answer about an exception to a person privately, or to the entire group indicated how important, or common, EA felt the exception was. Alice answered the question in front of the entire class, when EA was willing to make knowledge of the exception widespread. She told all ICs how to negotiate the exception. When she wanted to limit the knowledge about the exception, as in the case of the instructor agreement form or teaching outside the jurisdiction, she discussed it privately with the individual.

Teaching Activities

The cues about specific activities while teaching were given by Alice in the following statements:

> To lead a practice session, show the film [video], do the practice with partners, have partners check skill off. Then have instructor check off. Then look in the workbook to the action guide. Read the action guide telling the people what to underline, so to emphasize those points. This course has little student interaction.

In these statements Alice gave the cues to: follow a prescribed order of teaching activities; read the action guides; tell students to underline; and limit student interactions. No options were presented in these statements. Absolute conformity to EA's way of teaching was

indicated in Alice's statement, "If you do not want to teach by our methods, you should teach for someone else." When Alice lead a practice teaching session she modeled these cues. During the ICs' practice teaching sessions, they demonstrated their acceptance, or lack of acceptance, of these cues.

The cues about order of activities, reading, and underlining were clearly presented and consistently reinforced by Alice. If ICs did not lead the practice teaching session according to these cues, Alice corrected them. For example, Alice corrected Larry when he did not show the video. In Alice's review of the action guide, she read each action guide word for word to the ICs and told them which phrases to underline. She said, "Tell the students to underline the decision phrase on each tree [action guide]." Alice corrected the ICs in their practice teaching sessions if they did not tell the class to underline. When Nancy tried to add information to her session, Alice said, "Just read what was is in the book." No ICs, who paraphrased the text instead of reading it word for word, received a compliment from Alice on his, or her, practice teaching performance. She complimented and praised only instructors who read from the manual to the class.

The cue, to limit student interactions, was given by Alice. She told ICs, "You can ask if anybody had this

situation? Do you understand this? Has this happened in your life?" She told the ICs to ask "yes" and "no" questions, but not to ask questions that encouraged students to share their experiences with each other. Alice explained, "Sharing war stories will eat into you time. It can be fun sometimes. But, as a leader you must be patient, not mean, and keep them on track." Alice did not allow ICs to share their experiences during the session that she lead. She corrected Robert, George, Ann, and Larry during their practice teaching sessions when they asked other ICs to share their stories about the topic presented.

Follow "The Book"

Cues about the expected content and first aid methods were summarized in Alice's expression, "follow the book." The book was the instructor's manual. Alice gave cues concerning the content to be taught in the first aid course in her lectures, review of the action guides, and the practice teaching sessions. Alice described the first aid course as "a standardized program learning course." She explained the meaning of standardization and the activities of instructors in her statements:

> In all our courses, there is the same common knowledge, information, and [it is] taught the same way. At the same point all instructors do the same thing. The material the students are graded on is the same. You turn on and off the tape.

The cue in these statements was that the content and

teaching method should remain the same each time the course was taught.

The cue that the same information was to be taught was consistently reinforced by Alice during the ICs' practice teaching sessions. The cue of teaching by the book was reinforced when ICs did something that was not in the book. On several occasions, Alice corrected something an IC did by saying what he or she did was not in "the book". During Ann's first practice teaching session, Ann said, "The book is wrong." Alice corrected her by saying, "That is not the way we teach...You must teach and read what is in the book and shown on the film." When Alice corrected George for using an incorrect method to find a hand position for a skill she said, "When you teach, you have to teach it this way. We need to teach as the book does." Alice corrected Robert during his practice teaching session for using a term that was not in the book. Robert used the phrase "shake and shout." Alice interrupted him and said, "We don't teach 'shake and shout' anymore. As instructors, whether you like it or not, you need to go by the book." In all three of these situations, the "book"--the instructor's manual--was the ultimate authority for doing a skill regardless of past learning or experiences.

One cue, not using a face mask, was emphasized by Alice when she mentioned it during her lecture presenting an

overview of the first aid course. Face masks were devices used by EMTs and CPR instructors, trained by the Life Support Organization (LSO), not EA, for mouth to mouth resuscitation. Alice said, "Don't use face masks. They aren't effective and we don't teach the use of them." Alice did not give ICs a chance to question, discuss, or make comments about face masks. The cue was delivered as an ultimatum that was not to be negotiated.

ICs gave no verbal nor nonverbal reaction to the face masks cue when it was given. Later, when Alice could not hear their conversations, a few ICs talked with each other about using face masks. In two separate conversations between Robert and Ann and George and Charlie, they stated their plans to use face masks.

In practice teaching sessions Alice gave cues about how to teach. Some ICs demonstrated these overt behaviors in the skills demonstrations sessions or their practice teaching sessions. When ICs did not follow a cue about a first aid skill or the prescribed order of teaching, Alice corrected them.

Language Usage

There were direct and indirect cues about language usage. ICs were given cues about the technical vocabulary terms that they should use. The more subtle cue of using nuance of language to denote membership in a group was

modeled by Alice, but not directly explained to the ICs.

Alice told the ICs which technical terms to use, when she lead the CPR skills review and presented the overviews of the first aid course and the action guides. Alice instructed ICs to say: "911", instead of "EMS", and "action guide". Alice told ICs to substitute "911" for "EMS" three times during the first hour of training. She corrected seven ICs who did not say "911". ICs were corrected when they did not say the words, "action guide" or summarized the "action guide" instead of reading it word for word. After Robert's practice teaching, Alice asked him, "Did you just walk them through the action guide?" Robert said, "Yes." Alice responded, "Well, you didn't say action guide so they may just think it was a summary." After Ann's practice teaching Alice said, "I want to point out two or three people have done it [treated the action guide as a summary]. You go to the action guide [begin reading it] without telling them [students] to go to the action guide." When an IC did not use EA's technical vocabulary, or used a not approved term, Alice corrected them. Alice did not make the IC repeat his or her performance using the correct term, nor did she make the IC say the correct word.

Alice used nuances of language to express her membership in EA. This cue of using language to denote belonging to EA was subtle and indirect. Alice demonstrated

membership in EA by her language, but she did not instruct ICs to use specific words to denote membership in EA. Alice used the word "we" several times when she mentioned a rule or exception of EA. She said, "We want feedback...It is the order we laid out for you...We do it this way." There was no nuance of language used by ICs to denote membership in EA. ICs asked questions in the first person. Debbie asked "Why would I wait for someone to pass out?" Mac asked, "What if I teach all over the state?" Neither of these questions were asked in a way indicate membership in EA. If Debbie or Mac used the pronoun "we" instead of "I", membership in a group of EA instructors might be indicated.

The nuance of language used by some ICs illustrated their membership in groups other than EA. Robert and Ann used medical terms indicating their membership in a medical profession. Robert said, "patient". Ann said "xiphoid". Alice corrected both of them. She told Robert, "We say victim, not patient". To Ann she said, "We say breastbone, not xiphoid". Informal conversations between Robert, George, Ann, and Mac indicated their membership in LSO, not EA. Robert, Ann, and Mac talked with each other about teaching CPR for LSO. Robert's, George's, and Ann's discussions of face masks indicated their membership in LSO, which used face masks when teaching CPR. Several times Robert and Ann were corrected by Alice for saying a term, or

doing a skill, differently than the way EA taught it. In each case, they responded to Alice by saying that they were taught this way. They were referring to their activities for LSO, not EA.

ICs' Participation During Training

ICs' participation in training was examined for adherence to the prescribed behaviors cues, meeting their needs as adult learners, and their attitudes about conformity. ICs' behaviors and attitudes related to these cues were combined into a scale of socialization during training.

Behavioral Reactions To Cues

When ICs lead their practice teaching sessions according to Alice's cues they demonstrated the behaviors prescribed for EA's instructors. Use of EA's professional language, which was defined as the use of nuance of language to denote membership in EA and technical vocabulary, was not a behavior prescribed and reinforced in Alice's overt cues. She prescribed the use of EA's technical vocabulary only. The prescribed behaviors for EA's instructors were to use EA's technical vocabulary and follow the order of teaching activities in the instructor's manual.

As illustrated in Table 18, no IC used the complete EA professional language. No IC used language to denote membership in EA. Hanna, Debbie, and Charlie used both of

Table 18

ICs' Use Of EA's Professional Language

Scale	Cases	Evidence
High	No One	Used language to illustrate membership in EA; said both "911" and "action guide"
Moderate	Hanna, Debbie, Charlie	No use of language to illustrate membership in EA; said both "911" and "action guide"
Low	Robert, Nancy, George, Ann, Rick, Larry, Mac	No use of language to illustrate membership in EA; did not say "911" and "action guide"

the technical vocabulary terms desired in EA instructors. Mac used the term "911", but not "action guide". The remaining ICs did not use either of EA's technical vocabulary terms.

The ICs' behavior according to these prescribed cues is shown in Table 19. Hanna, Debbie, and Charlie lead their practice teaching sessions using EA's technical vocabulary and lead their practice teaching sessions according to the cues given by Alice. Alice complimented them on their performances. Nancy, Rick, and Mac did not use both of the technical vocabulary, but followed the order of teaching activities. Alice gave Nancy, Rick, and Mac suggestions during their practice teaching sessions that they implemented. Robert, Ann, George, and Larry did not use EA's technical vocabulary, follow the order of teaching activities, nor teach as Alice requested after they were corrected.

Needs As Adult Learners

The andragogical assumptions about needs of adult learners were used as a framework to examine ICs' participation during training. The time periods of before and during training and the formal and informal activities of training were examined for evidence about these needs and the conflicts that arose when these needs were not met.

The ICs' comments and behaviors supported that the

Table 19

Prescribed Behavior Demonstrated By ICs

Scale	Cases	Evidence
High	Hanna, Debbie, Charlie	Followed order of activities; said "911" and "action guide"; told ICs what to underline; did not ask ICs to share their personal experiences; Alice complimented his or her practice teaching performance
Moderate	Nancy, Rick, Mac	Followed order of activities; did not say "911" or "action guide"; told ICs what to underline; did not ask ICs to share their personal experiences; Taught according to cue after being corrected by Alice
Low	Robert, Ann, George, Larry	Did not follow order of activities; did not say "911" or "action guide"; did not tell the ICs what to underline; asked ICs to share their personal experiences; immediately conformed to Alice's correction, but corrected behavior did not last throughout training

andragogical assumptions about ICs' needs as learners were appropriate. Alice's statements supported andragogical assumptions of need to know, readiness to learn, and motivation. In training limited support for ICs' problem centered orientation, independent nature, and desire to share experiences with each other was found. Three andragogical assumptions about ICs as learners (their need to know, readiness to learn, and motivation to learn) were revealed in ICs' pre-socialized characteristics. The trainer's and ICs' statements about the ICs' presocialized characteristics, shown in Table 20, revealed that these three needs were established and satisfied before training.

ICs' statements about why they were taking training, plans to teach, and their objectives for learning revealed evidence about their need to know and readiness to learn. ICs entered the course with the knowledge that teaching first aid was important and that training was necessary in order to teach first aid. A factor of each ICs' readiness to learn were their plans to teach first aid within the next months. All ICs took training to meet their immediate need of teaching a first aid course. They differed from each other and the trainer on whether or not they felt that they needed to know the content of the instructors course in order to successfully teach. The training was designed to help induce a readiness to learn through a knowledge and

Table 20

ICs' Needs Revealed in Pre-training Characteristics

Assumptions	Evidence
Need to Know	
Trainer's Comments	"People learn first aid skills to help their family, neighbors, co-workers. Our instructors are legitimately conerned with teaching first aid to their fellow employees, club members." (Alice)
ICs' Comments	"I will be teaching aquatic or community staff who need it. One of the biggest problem we've had is scheduling and that is why we thought we would get trained." (Debbie)
	"They needed another instructor at work. I said I would." (Charlie)
Readiness to Learn	
Trainer's Comments	"The objective is to learn how to teach the standard first aid course. The skills and understanding; how the course is suppose to be run is important part of the course." (Alice)
ICs' Comments	"I'll teach to my summer employees." (Nancy)
	"Hope to get started as soon as I can." (Rick)
	"I'm suppose to teach 70 people per year not to mention seasonal employees." (Mac)
Motivation	
Trainer's Comments	"They get personal growth out of training. Being an EA instructor will help you climb the ladder at work. May get a job because you are an EA instructor." (Alice)
ICs' Comments	"One life saved is worth all the effort you will ever put in it." (Robert)
	"I think it is something that is good to know and we needed to have it down there [work]. It looks good on a resume." (Rick)

skills test on the basic first aid material at the beginning of class. All of the ICs passed the test. Many passed with high scores. Alice tried to induce readiness to learn my correcting ICs when they demonstrated their skills incorrectly. The range of ICs' objectives reflected their differences in readiness for learning. Some ICs wanted to learn more than other ICs. ICs' expectations, (See Table 5) reflected the content they felt they needed to know and to what extent ICs were ready to learn during training.

ICs' motives for learning were described in their statements about what they wanted to teach and the expected benefits from teaching. Different motives to teach were described by ICs. Hanna said, "[You] become an instructor for your own satisfaction." Mac said, "Motivated by my paycheck." Larry said he was motivated by, "Power. You are in charge." Some ICs expected teaching to benefit only themselves and some expected teaching to benefit themselves, as well as others. Alice felt that ICs entered training with the motivation to learn and participate. She said, "If they want to do it [teach], they usually try hard and do a good job." Motivating ICs was not an emphasis of training. Alice spent only a few moments at the beginning of training talking about the importance of the course as a preparation to learn how to teach the basic first aid course.

Three other andragogical assumptions about ICs as

learners were that they were problem oriented (orientation to learning), and independent learners (learners' self-concept) who wanted to shared their experiences with others (role of experience). Evidence about these assumptions is shown in Table 21. These statements by Alice and ICs revealed differences between the trainer's and ICs' assumptions about ICs as learners.

The training design supported the ICs' problem orientation to learn to teach a first aid course. The videos presented vivid scenarios of accidents and people giving first aid to the injured. The focus of the practice demonstrations was to administer the first aid skills. The practice teaching session was a practicum of teaching a unit from the course.

The training design and trainer's cues contradicted the assumptions that ICs were independent learners. The ICs were taught to be dependent and follow the "book". ICs were told to teach what was in the book and to underline important sections in their books. Alice corrected ICs who did not follow in the manual as she read, did not underline key phrases, did not take notes on her important comments, and did not lead the practice teaching session according to her cues.

The assumption that ICs were learning resources for each other was both supported and contradicted during

Table 21

ICs' Needs Revealed During Training

Assumptions	Source	Illustrations
Problem Centered	Trainer's Cues	"I hope by the end you know everything to be an instructor." (Alice)
	Training Design	Real life scenarios on video; skills and teaching practices
	Conversations Among ICs	Robert, Ann, George, and Charlie talk about face masks
		Robert, Rick, George, and Mac talk about adult learners
Independent Learner	Trainer's Cues	"We train all people the same way regardless of their background." (Alice)
	Training Design	Alice corrects Mac for having ICs practice at own pace
	Conversations Among ICs	"I can't believe we are having to go over this. We all know how to do it.(Larry)
Shared Resources For Learning	Trainer's Cues	"This course has little student interaction. Ask if anybody has questions, but don't allow students to share stories." (Alice)
	Training Design	Opportunities to practice skills with partner
	Conversations Among ICs	Robert, Hanna, George, Ann, Rick, Charlie, and Mac have conversation about teaching face masks and first aid

training. The training design was supportive of ICs serving as learning resources to help each other on prescribed tasks. The skills demonstrations and practice teaching sessions were opportunities for ICs to help and learn from each other. Alice told the ICs during training, "Practice teaching session is [the] time to make mistakes. Either your partner or I will point out the mistakes." ICs helped each other learn the prescribed EA way of teaching first aid skills.

Alice tried to limit ICs from sharing their personal experiences with each other during training. She told the ICs, "They [ICs and students] pick up our bad habits and we all have them." She did not validate ICs' previously learned techniques or language. When ICs shared a technique or a phrase learned prior to the instructors course, Alice corrected them.

Robert, Ann, George, and Larry ignored Alice's cue not to allow others to discuss their experiences. During their practice teaching sessions, they asked others to tell their experiences related to the topic. ICs talked informally about their experiences with rescue squads, basic first aid situations, and different skills techniques after skills demonstration sessions and during breaks.

Robert, George, Rick, and Mac whose objective for training was to learn about teaching, talked with each other

and the observer about teaching. These conversations occurred during breaks and did not include Alice. In one conversation Robert, George, and the observer talked about how adults away from school for years could learn. Rick and Mac listened to the following conversation:

> George said, "How can an adult, as old as me, learn or if he can?" Observer said, "Sure you can, or you wouldn't be here." George said, "I don't mean this, I mean from a book. I just can't sit down and get it." Observer said, "You just told me that I can learn something every time [see the video]. The same is true for you." George responded, "Oh, I can learn by doing, it is the books." The observer said, "Some people believe that adults learn best by doing. To learn you don't have to sit down for four hours and read." George turned to Robert, Rick, and Mac and said, "Boy, that is a relief. Maybe I'm not to old to learn."

In this conversation George answered his question about how older adults learn. By listening to the conversation Robert, Mac, and Rick gained information on their objective about teaching. In another conversation Rick talked with the observer about why she wasn't taking the course for certification. Rick told the observer, "You just said that you learn by doing. So you need to get up there and do it." Rick shared with the observer and the other ICs who were standing around his thoughts about how adults learn. On both of these occasions George and Rick shared their insights on learning not only with the observer but with the other ICs who were standing around.

In two side conversations about face masks Robert and

Ann and George and Mac, independent of Alice, solved their conflicts about teaching face masks. They were faced with the problem that they wanted to use face masks when they taught at work. This conflicted with Alice's cue of "Do not use face masks." During Robert's practice teaching session, Ann asked Robert, "Do you use pocket [face] masks?" Robert said, "Yes. I use pocket masks when I teach my EMT classes." Ann responded, "I'm going to teach about face masks even though she [Alice] said not to." Robert concurred with Ann in his response, "So am I." In this conversation Ann and Robert confirmed their intentions to use face masks.

The following conversation between George and Charlie indicated not only their personal intentions to teach face masks, but their reasons for using them:

> Charlie said, "Too bad we aren't trained to use mask." George said, "But we'll teach with them." Charlie responded, "We aren't authorized to use them when we certify." George replied, "Sam and those guys aren't going near someone without a mask, so we have to teach how to use them." To this Charlie said, "I guess, after we certify them, we can tell them about the masks." George commented, "Sometimes we just have to do things our way." Charlie said, "I'm new at this so I play by the rules." George replied, "Well, I know Joe and he won't [do the skill] without a mask, so we'll teach a mask."

In this conversation George, the experienced employee and former EA instructor, knew that face masks were necessary to motivate his fellow workers to give first aid. Charlie, a new employee and instructor, was planning to obey Alice's

cue not to teach face masks until George confronted him with the conflicting demands in his workplace. In this conversation the cue from George and the needs of the organization, where the first aid course was to be taught, outweighed Charlie's desire to teach according to Alice's cue.

These side conversations in which the ICs' questions and conflicts were resolved were not controlled by the trainer. The trainer appeared unaware of the conversations. During the face masks discussions, ICs gained support from each other to use face masks. When Alice didn't allow discussion or negotiation about the face mask cue, the ICs, independently of the trainer, used their fellow ICs as resources to answer their questions or solve their conflicts. They learned from each other answers to questions about teaching adults and gained approval to use face masks. ICs demonstrated that they were independent learners who wanted to learn from each other by sharing personal experiences. They sought answers to questions and solutions to their problems in their informal conversations with each other.

The needs of ICs as adult independent learners were met before or during the formal and informal sessions of training. The needs that were thwarted or suppressed by the training design or trainer's cues, emerged in ICs' side

conversations, not controlled by the trainer. It was in these conversations that evidence about ICs' attitudes of non-conformity to EA's cues emerged.

Conformity To Behavioral Cues

ICs' attitudes about conforming to EA's behavioral cues were illustrated in their reactions to Alice's corrections and their conversations with other ICs. In Table 22, these reactions were revealed as a scale of the ICs' attitudes about teaching EA's way. ICs' feelings about EA's power, or authority, over their behavior were reflected in these attitudes. Hanna and Debbie who scored high on the attitude scale, demonstrated an accepting attitude about EA by teaching the prescribed way without a confrontation with Alice. Nancy, Rick, and Mac, who scored moderate, demonstrated conformity by incorporating Alice's corrections, after being corrected by her. Robert, George, Ann, Charlie, and Larry, who scored low, demonstrated defiance of EA's cues. They rejected EA's cues for desired behaviors. Robert, George, Ann, and Charlie were defiant of EA's cues about teaching face masks. They told each other that they planned to teach their way regardless of Alice's cues. Larry's disruptions of class, negative comments about EA and the course, discussions with Ann about teaching against rules, and his refusal to complete assignments, were evidence of his defiance and low attitude about EA's

Table 22

ICs' Attitudes About Conforming To EA's Rules

Scale	Cases	Evidence
High	Hanna, Debbie,	Did what Alice asked without being corrected; gave no verbal or nonverbal indications of not accepting EA's cues
Moderate	Nancy, Rick, Mac	After corrections from Alice IC changed behavior according to the cue; gave no further verbal or nonverbal indications of not accepting EA's cues
Low	Robert, George, Charlie, Ann	Did not teach as Alice prescribed after being corrected; covertly defiant by stating plans in a conversation with another IC to teach face masks
	Larry	Did not teach as Alice prescribed after being corrected; overtly defiant of Alice by refusing assignment and being frequently disruptive in class; stated plans in a conversation with another IC to teach against EA's rules

controlling his behavior.

There was a similarity between groups of ICs on their scales of Prescribed Behavior Demonstrated (See Table 19) and the Attitude About Teaching EA's Way (See Table 22). Hanna and Debbie, who scored high on the prescribed behavior scale, demonstrated an accepting attitude. Nancy, Rick, and Mac scored moderate on both the prescribed behavior and attitude scales. Robert, George, Ann, and Larry scored low on demonstrating prescribed behavior and low on attitude about conforming. They demonstrated an obligatory attitude of behaving as EA prescribed. Charlie scored high on prescribed behavior scale and low on the attitude scale. This difference was probably affected by George, who was a supervisor where Charlie worked. George told Charlie how they would teach at work. For Charlie, a cue from someone at work held more authority to control his behavior than Alice's cue.

ICs' Scores Socialization During Training

Evidence of the ICs' socialization into EA during training was indicated by combining the ICs' prescribed behavior and attitudes scales. Their scores of socialization during training are revealed in Table 23. The degree to which ICs' demonstrated behavioral and attitude conformity determined their achievement on the socialization scale. Hanna and Debbie scored high on both behavior

Table 23

ICs' Scale of Socialization During Training

Scale	Cases	Evidence
High	Hanna, Debbie,	Behavior conformity without challenging Alice; no indication of teaching against EA's rules
Moderate	Nancy, Rick, Mac	Behavior conformity after correction from Alice; no indication of teaching against EA's rules
Low	Charlie	Behavior conformity without challenging Alice; agreed to teach against EA's rules
	Robert, George,	No lasting evidence of behavior conformity after correction from Alice; planned to teach against EA's rules
	Ann	Obligatory behavior conformity after correction from Alice; overt challenges to Alice; planned to teach against EA's rules
	Larry	Obligatory behavior conformity after corrections from Alice; did not accept assignments; frequently disrupting class; planned to teach against EA's rules

conformity and attitude, thereby demonstrating high socialization. Nancy, Rick, and Mac demonstrated moderate socialization. They were corrected by Alice and conformed to the correction. They did not use both of EA's technical vocabulary. They gave no indication of plans to teach differently than EA prescribed. Robert, George, Charlie, Ann, and Larry scored low on the socialization scale. Charlie demonstrated high behavior conformity, but scored low on socialization because he agreed to follow George's cue about teaching face masks instead of Alice's. Robert, George, and Ann were low on both behavior conformity and attitudes, thereby giving little indication of socialization into EA. Ann and Larry overtly challenged Alice in front of the rest of class. After Ann was corrected by Alice several times during training, she obliged and demonstrated the prescribed behavior in front of Alice. Larry was constantly disruptive in class, used none of EA's technical vocabulary, made negative comments about EA, and refused to complete his assignments.

Summary

A comparison of the groups of ICs on presocialized characteristics (See Table 15) and socialization scores (See Table 23) revealed some similarities and dissimilarities among ICs. There was a pattern found between some ICs' socialization scores and presocialized characteristics.

Hanna and Debbie, who scored high on socialization, had presocialized characteristics that were dissimilar. Among the group of ICs who scored moderate on socialization, Nancy and Rick had similar presocialized backgrounds. They both scored high on relationship to EA, low in preparation to teach first aid, and high on expectations. Mac, who scored moderate on socialization, had a presocialized background that was different from Nancy's and Rick's presocialized background. Those, who scored low on socialization, scored either moderate or low on expectations from training. Charlie, Robert, George, and Ann scored low on socialization and had moderate expectations for training. Larry scored low on socialization and had low expectations for training. In the group with Robert, George, Ann, Charlie, and Larry, who demonstrated low socialization, patterns between their relationship with EA and expectations emerged. Those who demonstrated low socialization scored either high or low on their score of relationship with EA. Robert, Ann, and Charlie scored high and George and Larry scored low on their relationship with EA.

Findings about the socialized dimensions of the nature of training, revealed how EA wanted instructors to behave, how ICs behaved during training, and how ICs planned to behave after training. By analyzing the former ICs', now instructors', statements during the interviews 30 days after

training, findings about their behaviors and feelings as EA instructors were discovered. These findings are reported in chapter 7.

CHAPTER 7

SOCIALIZATION DIMENSIONS AFTER TRAINING

The dimensions of socialization to be assessed in post-training interviews were identified in the definition of socialization chosen for this study. Socialization was defined as a process to encourage ICs to invest energy in roles that required conformity to norms. Findings about investment and conformity were found in the instructors', formerly ICs', statements about their teaching activities and plans, feelings about teaching for EA, and plans to conform and teach the course "by the book". Instructors' statements about plans to teach and feelings about teaching for EA described instructors' willingness to invest. Comments about how they planned to teach described whether or not they planned to teach the first aid course "by the book".

Teaching Activities Or Plans

The instructors formed three groups, according to their teaching activities following training. As shown in Table 24, instructors either taught or were scheduled to teach a course at work. Robert, Hanna, and George taught courses at work. Rick was scheduled to teach a course at work in two weeks. Nancy, Debbie, Ann, Charlie, and Mac planned to teach courses sometime. Only Larry had no definite plans to teach a course.

The location of teaching activities and plans after

Table 24

Instructors' Teaching Activity 30 Days After Training

Scale	Cases	Evidence
High	Hanna	Taught 11 courses
	Robert, George	Each taught 2 courses at work
Moderate	Rick,	1 course was scheduled to be taught within 30 days
	Nancy, Debbie,	Planned, but not scheduled to teach, at least 1 course within 30 days
	Ann, Mac,	Planned to teach in Fall when teaching activity fit into their work schedules
	Charlie	Planned to teach at church in the Fall when teaching activity fit into the church schedule
Low	Larry	No plans to teach

training were different from the pre-training plans. Before training, Robert, Nancy, George, Rick, and Charlie planned to teach community courses, as well as courses at work. After training, only Rick and Charlie were definite about their plans to teach community courses. The courses taught, or planned, were courses at the instructor's place of employment. The most immediate interest of the instructors was to meet the needs of their place of employment.

Hanna's, Nancy's, and Debbie's post-training activities reflected a change from their pre-training interviews. Hanna did not teach community courses as she mentioned in her pre-training interviews. After training, she was hired as a paid employee for EA. She taught her 11 courses not as a volunteer, as originally planned, but as a paid employee of EA. Nancy and Debbie originally planned to teach at least two courses within 30 days of the training. Their plans changed when EA enforced a $15.00 per student charge for the course. They were expecting the student fee to be waved in exchange for their time as instructors and EA's use of their organization's facilities for other courses.

Instructors' Feelings About Teaching For EA

Most of the instructors felt positively about teaching for EA. Their statements revealing their feelings about teaching for EA are recorded in Table 25. Robert, Hanna, and George made highly positive statements about teaching

Table 25

Instructors' Positive Feelings About Teaching For EA After Training

Feelings	Cases	Illustrations
High	Robert	"It's okay. The films were good. Some of the techniques are different. I might teach in the community, just wait and see."
	Hanna	"I enjoy teaching....It is something you do, do it right, and take a lot of pride in it."
	George	"I like it. It's pretty good. I offered to teach supervisors on off time."
Moderate	Nancy	"When it is over I hope I can say it was a breeze."
	Ann	"Just show the film, turn it on and off."
	Rick	"I'm a little apprehensive about my first time."
	Debbie	"It is hard [to teach for EA], but they are the standard. They think only their way is correct and then the costs."
	Charlie	"I feel okay about it, but I haven't taught yet."
	Mac	"There are a lot of rules. Can work around some [of the rules].
Low	Larry	"Just too stressful. Getting all that equipment and supplies. It just doesn't seem worth it. I'll teach so that I don't have to go that [instructors course] again."

for EA. Each of them enjoyed the first aid courses that they taught for EA since training. Nancy, Ann, Rick, Debbie, Charlie, and Mac expressed moderately positive feelings about teaching for EA. Nancy and Rick expressed the same personal feelings of anxiousness about teaching that they did in their pre-training interviews. Ann and Charlie said that the material seemed "okay" to teach. Debbie and Mac mentioned concerns over some of EA's rules. They mentioned similar concerns in their pre-training interviews. Larry felt negatively about teaching for EA. He didn't want to teach. He said that he might teach so that he wouldn't have to take the first aid instructors course again.

A similarity among the instructors' feelings about teaching for EA and their teaching activities was found. Robert, Hanna, and George, the instructors with highly positive attitudes about teaching for EA, were the instructors who had taught EA's first aid courses since training. The instructors with moderate feelings about teaching were the instructors who had not taught a course, but planned to teach. Larry was the only instructor with negative feelings about teaching for EA and the only IC who mentioned that he might not teach.

Instructors' Plans To Conform

The instructors' plans to conform to EA's standards,

"teach by the book", were revealed in their statements about teaching. Conformity was evidence of successful socialization. As indicated in Table 26, some of the instructors planned to conform and some did not. Hanna, George, and Rick made statements revealing conforming to EA's standards. They said that they would teach according to the cues given during training without adaptation. Hanna reported that she resisted peer pressure to teach differently than the way Alice taught her. George said that he did not plan to teach face masks. This contradicted his pre-training and during training statements about using face masks. Rick demonstrated conformity by working with EA's officials to gain permission to make an adaptation to the course.

Nancy's, Debbie's, Charlie's, and Mac's comments about teaching indicated moderate conformity to EA's cues. They said that they would try to teach the "EA way" and gave no indications that they planned to adapt the material without EA's approval. Robert, Ann, and Larry made statements indicating low conformity to EA's cues. They planned to teach some aspect of the first aid course differently than the cues they were given in class. Robert and Ann planned to teach face masks. Larry planned to have students share books, thereby not paying the per student fee for the course. Their low conformity scores indicated that they

Table 26

Instructors' Conformity To Teach "By The Book" After Training

Scale	Cases	Illustrations
High	Hanna,	"When I team taught I found a lot of people weren't doing that [teaching as Alice taught], so I thought should I conform to old ways. Students were failing so I just taught as I was taught."
	George,	"Alice said no [don't use face masks], so I didn't."
	Rick	"Teach step by step. I asked the council's permission to make a change."
Moderate	Nancy,	"Hopefully I [can] get across what I suppose to.""
	Debbie,	"They are the standard."
	Charlie,	"[I'll] try to teach as taught."
	Mac	"There are a lot of rules. Some [you] can get around."
Low	Robert,	"I'll use face masks."
	Ann,	"I'll use face masks."
	Larry	"We have books and will share them."

planned to teach the course their way. They did not accept EA's cues to conform and control their behavior.

Evidence of Socialization After Training

Together the instructors' teaching activities or plans, feelings about EA, and conformity to teach "by the book" were combined into a scale of socialization after training. As shown in Table 27 instructors scored differently on socialization after training.

Hanna, George, and Rick scored high on this socialization scale. Both Hanna and George taught courses, felt positive about EA, and resisted temptation to teach against EA's cues. Rick scheduled one course, expressed moderate feelings about EA, and gained approval from EA to make an adaptation. Nancy, Debbie, Charlie, and Mac scored moderate on the socialization scale. They scored moderate on teaching activity and positive on feelings about teaching for EA. They planned to teach a course in the future and gave no indications of plans to teach against EA's rules. Robert, Ann, and Larry scored low on the socialization scale. Robert and Ann were moderate in their teaching plans and feelings about teaching and low on conformity. Socialization required conformity. They scored low on socialization because they planned to teach face masks. Larry was consistent in his low scores on all dimensions of socialization after training.

Table 27

Instructors' Scale Of Socialization After Training

High	Cases	Evidence
High	Hanna, George,	Taught courses, positive feelings about teaching, no planned adaptations
	Rick	Course scheduled in 30 days, felt teaching to be worthwhile, negotiated adaptation with EA
Moderate	Nancy, Debbie, Charlie, Mac	Plans to teach sometime in the future, moderate feelings about teaching, will teach according to rules
Low	Robert, Ann,	Planned to teach unapproved adaptation
	Larry	No plans to teach, negative feelings about teaching, planned to teach in an unapproved way

Summary

Findings about socialization after training provided insights about the ICs' willingness to invest and to conform after training. Some ICs appeared to change throughout the socialization process. A similarity between ICs' presocialized characteristics and their scores of socialization after training was found.

ICs interactions with each other were descriptively organized into a training nucleus (See Table 2). Larry and Alice were not members of the nucleus. The other ICs were. As illustrated in Table 28 training nucleus members scored differently on socialization after training. These scores represented the differences in training nucleus members' willingness to invest and conformity. Hanna, George, and Rick scored high in socialization after training. They taught courses, felt positively about teaching for EA, and indicated conformity to EA's rules. Robert and Ann scored low on socialization after training. Robert taught a course and Ann planned to teach. But, they both planned to teach against EA's rules. Nancy, Debbie, Charlie, and Mac, who scored moderate on socialization after training, neither scheduled, nor taught courses, nor indicated plans to teach against EA's rules.

When instructors' scores on socialization during and after training were compared with each other and their

Table 28

Training Nucleus Members' Socialization Scores After Training

High Socialization Score	Moderate Socialization Score	Low Socialization Score
Hanna	Nancy	Robert
Rick	Debbie	Ann
George	Charlie	
	Mac	

Note: Larry was not a member of the Training Nucleus

presocialized characteristics, patterns emerged. As revealed in Table 29, some of their scores on socialization during and after training were different. Patterns between ICs' expectations as ICs and their scores of socialization after training were found.

There was no change in Robert's, Hanna's, Nancy's, Ann's, Larry's and Mac's socialization scores during and after training. George's, Rick's, Debbie's, and Charlie's scores changed. George demonstrated the most positive change towards EA in his socialization scores. George changed his negative feelings about EA and his plans to teach against EA's rules. Rick and Charlie showed some positive growth. Because, unlike George, they did not enter training with negative feelings about EA and plans to teach against EA's rules, their socialization scores did not change as much as George's socialization scores. After training, Rick negotiated adaptations with EA's officials to make course adaptations. After training, Charlie did not mention using face masks. Debbie scored lower on socialization after training than she did during training. During training, Debbie demonstrated the prescribed behaviors. She did not speak negatively about EA, nor its rules. After training, she spoke negatively about EA's rule of course fees. She did not think she should have to pay student fees for the course when she taught the course and

Table 29

Instructors' Pre-training Characteristics and Socialization Scores

Cases	Expectations	Background To Teach First Aid	Relationship With EA	Self-Interest	Socialization During Training	Socialization After Training
1	Moderate	High	High	Low	Low	Low
2	High	High	Moderate	Low	High	High
3	High	Low	High	Moderate	Moderate	Moderate
4	Moderate	Moderate	Low	Moderate	Low	High
5	Moderate	High	High	High	Low	Low
6	High	Low	High	Low	Moderate	High
7	Moderate	Moderate	Low	High	High	Moderate
8	Moderate	Moderate	High	Low	Low	Moderate
9	Low	Moderate	Low	High	Low	Low
10	Moderate	High	Moderate	High	Moderate	Moderate

Note. Case 1 = Robert; Case 2 = Hanna; Case 3 = Nancy; Case 4 = George; Case 5 = Ann; Case 6 = Rick; Case 7 = Debbie; Case 8 = Charlie; Case 9 = Larry; Case 10 = Mac.

EA used her organizational facilities for other EA courses.

When the ICs' socialization scores after training were compared to pre-training characteristics, patterns emerged. A pattern was found between the ICs' expectations and their scores of socialization after training. Hanna and Rick, who had high expectations for training, scored high on socialization after training. George, Debbie, Charlie, and Mac, who held moderate expectations for training, scored moderate on socialization after training. Larry held low expectations and scored low on socialization after training.

Whether or not instructors' demonstrated conformity after training was an indication of their socialization as an EA first aid instructor. Evidence about whether or not EA would be satisfied with these socialization scores was found by analyzing officials' expectations of instructors with the findings about the nature of the training and the socialization scores. These findings are presented in chapter 8.

CHAPTER 8

OFFICIALS' AND ICS' EXPECTATION OF THE SOCIALIZATION PROCESS

Findings about ICs' expectations of the socialization process, originally reported in Chapter 5, were referenced in this chapter to provide an understanding about the difference in ICs' and officials' expectations.

Yvonne, Nathan, Elizabeth, and Alice were the officials representing EA. Alice and Yvonne were paid staff members of EA. Nathan and Elizabeth were volunteers. Officials used the term instructors to refer to both instructor candidates and instructors.

Findings about EA officials' expectations of the socialization process were discovered by examining their statements about instructors and the first aid instructors course. Models of officials' expectations were compared to the ICs' presocialized characteristics, the nature of training, and evidence about instructors' socialization after training. From these comparisons, statements about the officials' satisfaction with the instructors trained in the first aid instructors course were made.

Officials' Expectations of Instructors

Officials' descriptions of first aid instructors were analyzed to discern or identify their expectations of the presocialized characteristics that instructors brought into the course and how instructors should teach. These expectations were combined into two models of EA

instructors.

Presocialized Characteristics

Officials agreed on most of the expected presocialized characteristics for instructors. The categories of presocialized characteristics were: expectations, backgrounds pertinent to teaching first aid, relationship with EA, and self-interests. As shown in table 30, officials expected instructors to want to learn how to teach the basic first aid course. They expected instructors to have varied backgrounds pertinent to teaching first aid. They expected instructors to be dependable. Officials expected instructors to teach once or twice a year at work and possibly one community course per year. Officials expected that teaching the first aid instructors course would benefit the instructor, as well as the people they taught. Officials did not agree on two expectations: how an instructor's background pertinent to teaching first aid and their relationship with EA would guide their participation in the instructors course.

Officials differed in their expectations about how someone with a nursing, or emergency rescue, background would participate in the course. Alice did not think previous backgrounds in nursing, or emergency rescue, made any difference. Yvonne expected nurses to "have an easier time". Nathan and Elizabeth expected previous backgrounds

Table 30

Officials' Expectations of Instructors' Characteristics

Characteristics	Officials	Illustrations
Expectations For Training:		
To teach how to teach the basic first aid course	Alice, Yvonne, Nathan, Elizabeth	"The philosophy of the course is to effectively prepare candidates to teach the course." (Nathan)
Background:		
Variety of experiences	Alice, Yvonne, Nathan, Elizabeth	"There is lots of variations of the type of experiences people come into the course with." (Alice)
Relationship With EA:		
Dependable	Alice, Yvonne, Nathan, Elizabeth	"Willing to say yes when I call to say I need them. They would be dependable." (Yvonne)
Detached relationship with EA	Alice, Yvonne	"Drawback of a large council, you are just a name in a file." (Alice)
Positive feelings about EA	Nathan, Elizabeth	"Someone who had a viable feeling about EA and can get that across. Viable feeling is that it [EA] is alive and worthwhile organization to be with." (Elizabeth)
Self-interests:		
Plan to teach one or two courses per year	Alice, Yvonne, Nathan Elizabeth	"We have some that teach once or twice a year. Most of our instructors were sent by their company." (Alice)
Teach for benefits to self as well as others	Alice, Yvonne, Nathan, Elizabeth	"I think we do it for self-worth. You learn about yourself. You help others." (Elizabeth)

to be a difficulty during the course. Nathan said,

> I think sometimes, especially on the medical side, the doctors, nurses, and EMTs tend to use more knowledge. That is actually a detriment to the course because they aren't following EA's guidelines. You deviate from the book or instructor's manual and you will go over time. Plus, you are teaching them stuff that they aren't supposed to be learning.

Officials disagreed on the instructor's relationship with EA. They did not agree on whether or not instructors were, in reality, dependable and how instructors felt about EA. Alice and Yvonne, the paid officials expressed that instructors were undependable. Alice said, "When you deal with a volunteer instructor, if the weather is bad or they are feeling lousy, they won't come." Nathan and Elizabeth, the volunteer officials, thought that volunteer instructors were dependable. They felt that the commitment was the same and sometimes greater, if the person was a volunteer. Elizabeth said, "Some volunteers do more than paid people because, as a volunteer, you can define how far you will go. It doesn't matter who [volunteer or paid] is teaching the course. It shouldn't be taught any differently." These officials did not disagree on whether or not an instructor should be dependable. They disagreed on whether or not they thought instructors were dependable.

Paid and volunteer officials described different feelings held by instructors about EA. Alice and Yvonne used instrumental and emotionally detached terms to describe

instructors' feelings about EA. They described instructors as tools to accomplish EA's goal of teaching first aid. They expected that instructors came to EA for training because EA was the only organization with the goal to teach first aid courses. Nathan and Elizabeth described instructors with positive feelings and enthusiasm for EA. They expected instructors to believe in the values and social commitments of the organization and demonstrate enthusiasm for EA, while they taught the first aid course.

How Instructors Should Teach

The officials' descriptions of how instructors should teach were similar. As revealed in Table 31, instructors were expected to follow the administrative guidelines and the instructor's manual. Alice summarized the expectations of an instructor in her statements,

> The job of the instructor is to follow the manual and check the technical skills, and make sure the students do the skills correctly. Keep the class on track and not spend a lot of time in conversation, or questions, off the programmed course. They would stick to the subject, follow the course outline, and finish on time. Get the paperwork in on time.

Officials called the first aid instructor a facilitator. They expected the facilitator to follow a prescribed order of administrative and content delivery tasks. Nathan summarized the officials' expectations of the instructor of a first aid course as:

Table 31

Officials' Expectations Of How EA's Instructors Teach

Activities	Illustrations
Complete the paperwork	"Complete the forms as required...Fill out all forms prior, during, and end, and get certificates to students." (Nathan)
Facilitate class	"He [instructor] is a facilitator who knows how to turn on the VCR and off at what points to do it....And so his main job is to keep the class on track, check the practice skills, make sure they are doing everything correctly." (Alice)
Follow the guidelines	"A volunteer instructor should be committed to the guidelines. Teach as the skill is taught in the book and not substitute it with something from the advanced first aid book." (Nathan)
Follow the script in the instructor's manual	"A good instructor for EA will follow a script and order of teaching." (Yvonne)
Conform to EA's rules	"I do point out that the objective is for them to change their behavior, for them to do what we want them to do." (Alice)

> You aren't teaching. The video tape does the teaching. The teacher turns the videotape on and off, tells the students to come out and teaches a skill they supposedly already know. First aid is at the point now where the teaching is at a minimal. The videos, book, and practice sessions are teaching the student, so you are really a facilitator. A teacher actually translates information from them to the student. The facilitator merely makes sure the student knows what page they are suppose to be on, and at what time.

Officials expected instructors to conform to EA rules. No options about administrative duties, content, or how to teach were presented. Elizabeth said, "There are not a lot of options. That option about how to learn [teach] is not there." Officials' expectation of conformity was illustrated in Yvonne's statement, "Instructors should follow the order because it is required."

Officials did not specifically mention the use of professional language in their expectations of instructors. Use of professional language was implied in their statements, but it was not stated as an expectation. Officials used nuance of language to denote their membership in EA and the technical vocabulary terms. They used the term "we" when speaking about EA. Elizabeth's statements of, "We teach....How do we get certification?" were illustrative of officials' nuance of language to illustrate membership in EA. Officials used the technical vocabulary terms of "911" and "action guides" when they explained the first aid skills.

Models of EA's Instructors

By combining the officials' expectations of instructors and how they should teach, two models of EA's instructors were developed. These two models are illustrated in Table 32. The difference in these two models were how instructors' backgrounds and the instructors' relationship with EA guided their participation in training. In the model described by Alice and Yvonne, the paid trainer and administrator, an instructor's background either did not guide their participation or helped their participation. They expected instructors to be dependable and emotionally detached members of EA's workforce. In the model described by Nathan and Elizabeth, volunteer officials, an instructor's background hindered their successful participation in training. They thought that instructors were dependable and emotionally attached members of EA's workforce.

Officials' Expectations About The First Aid Instructors Course

Officials agreed on the expectations for the first aid instructors course. They agreed on what should be included and what should not included in the first aid instructors course. From their expectations of the course, a model of the first aid instructors course, as illustrated in Table 33, was developed.

Table 32

Models of EA's Instructors Expected By Officials

Model Expected by Paid Officials	Model Expected by Volunteer Officials
Characteristics	Characteristics
High backgrounds pertinent to teaching first aid helped or did not hinder participation during training	High backgrounds pertinent to teaching first aid hindered participation during training
Dependable	Dependable
Detached relationship to EA	Affective relationship to EA
Plan to teach 1 or 2 courses per year at work and one community course	Plan to teach 1 or 2 courses per year at work and one community course
Teach as a volunteer	Teach as a volunteer
Teaching benefits self as well as others	Teaching benefits self as well as others
Activities	Activities
Complete the paperwork	Complete the paperwork
Facilitate class	Facilitate class
Follow guidelines	Follow guidelines
Follow script in manual	Follow script in manual
Conform to EA's rules	Conform to EA's rules

Table 33

Model In Training Expected By Officials

Activities Of A Model Training Expected By Paid and Volunteer Officials	Illustrations
Review procedures	"We review all current EA procedures. The forms you need to fill out, how to reserve equipment, how to get forms in. How to get certificates to students." (Nathan)
	"They get into the skills for that instructor, as well as review for them the paperwork that goes along with that particular course as well as practice teaching." (Elizabeth)
Review the instructor's manual	"The instructor manual has very good outlines and lesson plans and tells page by page how to run the class. I tell them where to find it in their books." (Alice)
	"I think what we do is give the ICs the tools, practice teaching situations, to make sure they can follow the book properly." (Nathan)
Review technical skills	"They are checked on the skills when they come into the instructors course. We can't teach them the basic skills. (Alice)
	"We review first aid skills. We go over new techniques since the basic course. We try in class to recognize weakness in these skills." (Nathan)
Conduct practice sessions	"You need in a practice session to catch mistakes as they occur and correct them at that time." (Nathan)
	"We teach people...how to check off skills." (Alice)

Officials expected the training activities to explain the content and activities of the basic first aid course. They did not expect the underlying reasons for this content and activities to be discussed, nor did they expect to spend time negotiating conformity to rules. Conformity without negotiation was expected.

Officials described that instructors learned how to teach the basic first aid course by reviewing the procedures, tools [manual and videos], and leading practice teaching sessions in the first aid instructors course. Alice and Elizabeth added that instructors learned to teach by modeling what their trainer did in the instructors class. Alice said, "The instructors learn this [how to instruct] from seeing me do it with them. I hope they will teach as they have been taught by me." Elizabeth said, "I try to teach the way I was taught."

Officials did not expect the course to teach instructors about teaching in general. They expected instructors to learn the specifics of the basic first aid course. Nathan's statement was illustrative of the officials' statements about learning to teach during the first aid instructors course. He said, "In four hours we can't teach you how to teach. I think what we do is give the instructors the tools and practice teaching situations to make sure they can follow the book properly." Alice

repeated Nathan's expectation in her statements, "We don't teach people to teach. We teach how to turn on and off a projector." Alice felt the basic skills must be learned prior to the instructors course. She said, "We refine them quite a bit, but we can't teach them the basic skills."

Comparison of Officials' Expectations To Components of The Socialization Process

The officials' expectations were compared to the socialization components contained in the first aid instructors course. The components compared were the ICs' presocialized characteristics, the nature of training, and the evidence of socialization after training.

Comparison of Officials' Expectations To ICs' Presocialized Characteristics

There were similarities and dissimilarities between officials' expectations and ICs' characteristics. Officials held different expectations for training than ICs. The volunteer officials' expectations about how ICs' backgrounds guided their participation in training was accurate. The officials' expectations about the ICs' self-interests were accurate.

Officials' and ICs' expectations (objectives and feelings) about the course were different. Officials expected the instructors' course to serve the limited function of preparing ICs to teach the first aid course.

They did not expect ICs to learn about teaching in general in the instructors course. Robert's, Hanna's, Nancy's, Debbie's, Rick's, and Mac's objectives for training were to learn about teaching in general. After training, these ICs said that they learned how to teach the EA way, but not about teaching in general. Officials thought that all ICs needed to take the instructors course in order to successfully teach the basic first aid course. Only Hanna, Nancy, and Rick expressed that the instructors course was necessary for them to be able to teach the first aid course. The other ICs felt that they could teach the first aid course without the instructors course.

Officials and ICs had different expectations about how instructors should teach. The officials' expectations about how to teach were revealed in Table 31. The ICs' expectations, previously explained in chapter 5, about how to teach were summarized in Table 34. The officials expected instructors to be less interactive than the ICs' expected. This difference was illustrated during training when Alice contradicted two of the ICs expectations about how instructors should teach. Alice contradicted the expectation of sharing personal experiences held by Robert, Hanna, George, Rick, Debbie, and Mac when she told the ICs not to share their experiences with each other. She contradicted Ann's and Larry's expectations when she told

Table 34

ICs' Expectations About How To Teach

Activities Of A Teacher	Cases
Make class and material interesting	Robert, Hanna, George, Ann, Rick, Debbie, Larry, Mac
Explain and Demonstrate	Robert, Nancy, George, Debbie, Charlie, Larry
Share experience with others	Robert, Hanna, George, Rick, Debbie, Mac
Build confidence in students	Robert, Nancy, George, Ann, Debbie
Don't read to students	Ann, Larry

the ICs to read to their students.

Paid officials did not accurately expect ICs' backgrounds to influence their participation in training. Nathan and ELizabeth expected EMTs or nursing background to be a hindrance during training. Nathan's and Elizabeth's expectation that nurses and EMTs had "a harder time" was evident during training. Robert, Ann, and Mac (EMTs) were frequently corrected by Alice. Officials did not expect ICs to have negative relationships with EA. They expected either neutral or positive feelings. Prior to training Hanna, George, Debbie, Larry, and Mac made negative statements about EA.

Officials were accurate in their expectations of ICs' self-interests. As expected most of the ICs planned to teach at work and felt that teaching helped themselves as well as others. Only Hanna expected to teach all community courses. Robert, Nancy, George, Rick, and Charlie, planned to teach both work related courses and a community course. Robert, Hanna, Nancy, George, Rick, and Charlie perceived teaching would help themselves, as well as others.

Comparison of Officials' Expectations To The Nature of Training

The structure and conduct of training were consistent with officials' expectations of training. During training the administrative duties, instructor's manual, technical

skills, and leadership of practice sessions were expected to be reviewed. Cues about how to teach, given during the instructors course, were consistent with the officials' expectations. No time was spent in training discussing conformity to EA's rules. Alice told ICs to use EA's technical terms like "911" and "action guides". She modeled the use of "we" to denote membership in EA, but did not instruct ICs to say "we". Officials did not mention that they expected ICs to use language to illustrate membership in EA nor conformity to be discussed in the course.

Officials' expectations of what ICs learned in the first aid instructors course was achieved. As shown in Table 35, ICs' statements about what they learned during training indicated that officials' expectations of training were met. Robert, Hanna, George, Ann, and Mac said that they learned to teach "the EA way". Nancy, Rick, Debbie, and Charlie said they learned what to teach and the order of activities. Only Larry said he learned nothing.

Summary

The main expectation of all ICs' to be certified was satisfied in the course. George's, Ann's and Charlie's objective to be certified and learn first aid was satisfied. Robert's, Hanna's, Nancy's, Rick's, Debbie's, and Mac's objective to learn about teaching was not satisfied. The way in which the course was structured and conducted was

Table 35

ICs' Statements About What They Learned During Training

Scale	Cases	Illustration
High	Robert, Hanna, George, Ann, Mac	"Some of their techniques are different. She really came down on me if I didn't teach something her way." (Robert)
		"She expects us to teach as she did." (Hanna)
		"She wants it taught a certain way." (George)
		"Had to give feedback just like she said it or you were wrong." (Ann)
		"She was tough. Had to do it just right." (Mac)
Moderate	Nancy, Rick, Debbie, Charlie	"Learned something to teach." (Nancy)
		"Made course seem simple, teach it step by step." (Rick)
		"Learned what to teach when." (Charlie)
		"Learned how to do it better and what to teach." (Debbie)
Low	Larry	"Total waste of time."

dissimilar to ICs' expectations.

By comparing the officials' expectations of the ICs' characteristics, the nature of training, and evidence of socialization after training, statements about the officials' satisfaction with the course were made. As reported in the preceding sections of this chapter, many of the officials' expectations of the ICs' characteristics were not satisfied. The nature of training satisfied the officials' expectations.

Analyses and discussion of the findings reported in chapters four through eight will be presented in chapter 9.

CHAPTER 9: FINDINGS ABOUT TRAINING AS A SOCIALIZATION PROCESS

Chapters 4 through 8 presented results about training ICs in an EA first aid instructors course. Through cross-analysis of the case descriptions, findings about what ICs and officials expected from training and how the ICs and the trainer responded during training were discovered. The discernible insights and patterns that emerged in the findings presented a range of analytical considerations for conclusions and recommendations from the study.

Descriptions of Training

The description of the first aid instructors course, in chapter 4, provided a context for understanding the socialization process. The case studies of ICs described their progress during training. The training environment, registration procedures, principal transactions, and EA officials were contextual elements for the ICs' socialization.

ICs appeared to respond in similar ways to the training room. No one complained, appeared surprised, nor commented, one way or another, on the multi-sensory stimulating environment of the training room. Except for opening the blinds and being cold in the afternoons, ICs seemed indifferent to the classroom environment.

The course's registration procedure revealed an absence of a selection criteria for ICs. ICs were admitted into the

course without a pre-requisite of accepting EA's professional norms or skills. EA allowed anyone, who held a basic first aid certificate and paid 40 dollars for the course fee, to enroll in the course. Without a selection criteria for ICs' presocialized characteristics, EA established the potential for a broadly heterogeneous group of ICs to participate in training. The ICs were found to be a heterogeneous group with an array of presocialized characteristics, individual changes, and idiosyncratic responses during training.

The principal transactions of the first aid instructors course were the same for everyone. The ICs responded in different ways to these principal transactions. They gave different verbal and nonverbal responses to Alice's cues during training.

The description of officials provided cues about how Alice was expected to conduct training. Officials' expectations provided a basis for comparing EA's expectations to ICs' expectations and to the events of training.

The ICs' characteristics, behaviors, and attitudes before, during, and after training were described in the case studies. ICs with similar characteristics were found to have similar behaviors and attitudes during training. Not all of these characteristics, behaviors, and attitudes

were found to be consistent with EA's desired professional norms.

Interactions of ICs' and Officials' Expectations

IC's expectations were found to be different than the officials' expectations. The difference in ICs' expectations and officials' expectations were illustrated in their different responses during training.

ICs' Expectations And Responses

ICs expected to become certified in the EA first aid instructors course. Hanna, Nancy, and Rick wanted to learn as much as possible about first aid and teaching. Robert, George, Ann, Debbie, Charlie, Larry, and Mac were interested in learning more about first aid or teaching during training. But the latter group felt that they could teach a first aid course without training. Robert's, George's, Ann's, Debbie's, Charlie's, Larry's, and Mac's statements did not indicate that they felt a need to change behavior, skills or attitude during training.

All of the ICs expected the course to be taught with more interactive involvement than was offered. ICs expected a trainer to be motivational and share personal experiences to make the course interesting. ICs described a trainer as someone who adjusted the training to meet the needs of trainees. They expected the structure of training to give the trainer flexibility, or independence, to adjust to the

needs of the specific trainees. ICs described training as "too long" and "boring". ICs' expressions of their dissatisfactions with the course indicated that training did not meet their expectations.

Robert's, Nancy's, Ann's, George's, Larry's, and Mac's demonstrations of first aid or teaching techniques were not acceptable to EA. ICs adjusted in different ways to cues that EA expected them to change from their former skills to EA's desired behaviors. Some ICs readily conformed, some conformed after corrections, and some conformed in front of the trainer, while indicating non-conformity behind the trainer's back.

Hanna, Debbie, and Charlie were found to conform readily to Alice's cues during training. They did not challenge any of EA cues for first aid skills nor teaching techniques. Nancy, Rick, and Mac demonstrated the desired behaviors after Alice corrected them. Robert, George, and Ann did what Alice requested, after she corrected them and they questioned the correctness of EA's technique. Robert's, George's, and Ann's changed behavior did not continue later in training. Larry was the least cooperative IC. He was disruptive in training and did not lead his practice teaching session according to the cues after being corrected.

All ICs responded to Alice's expectations of training

by demonstrating the required first aid skills. ICs appeared to resolve to do what was expected of them to complete training. As the course progressed, ICs, except Larry, were found to passively withdraw from active participation in training. ICs responded to Alice's authoritative statements, or correction, through silence, nonverbal gestures, or side comments to other ICs.

Trainer's Expectations And Responses

Alice and other EA officials expected ICs to be taught the job skills needed for instructors to teach the basic first aid course. Volunteer officials, not Alice nor the paid administrator, hoped that ICs would learn these job skills, as well as develop pride and commitment to EA's purpose and its social activities.

The content and conduct of training were found to be similar to Alice's expectations. Alice, who did not expect ICs to develop a pride and commitment to EA and its social activities during training, did not emphasize the importance of EA's purpose and activities during training. Alice taught the instrumental skills, job related skills, which were expected by all officials. Before training Alice said, "The skills and understanding of how the course is supposed to be run are the important parts of the course [and] how to use the instructor's manual." Alice emphasized this content during training.

Alice expected ICs to change and taught the course accordingly. Before training she said, "I do point out that the objective is for them to change their behavior, for them to do what we want them to do". Alice expected ICs to learn to be dependent on the instructor's manual. They were told to teach only the content in the manual. Alice repeatedly told the ICs to follow "the book" and teach "by the book". When ICs taught something that was not in the book, they were corrected.

Alice did not initiate, nor allow, discussions of the rationale behind EA's rules. Cues about EA's rules were presented as ultimatums to be accepted, not as items for discussion. Whether or not the rules about class size or geographic jurisdictional limits were appropriate was not discussed. Whether or not the rules about first aid techniques were correct, as in the case of Ann's choking maneuver or Robert's CPR technique, was not discussed. Whether or not it was appropriate for ICs to read to their students or tell their students to underline was not discussed. In each case Alice told the ICs to do it "by the book". Whether or not the book was correct was not discussed. The connection between teaching and using skills from a legally recognized authoritative source (EA) and one's personal liability risk (as an instructor) were not employed as a rationale for doing EA skills "by the book".

Alice was not found to drop any of her expectations of training to respond to the ICs' reactions during training. She taught the course according to her expectations. When Alice was questioned by ICs, she demanded that "the book was correct" and did not waiver from that stance. She told ICs, "If you do not want to teach by our methods, you should teach for someone else." Alice appeared to add, as a course objective, that ICs accept EA as sacrosanct and its teachings as the standard for first aid instruction.

Alice responded in three different ways when ICs did not demonstrate the behavior that she requested. Each time an IC demonstrated an incorrect first aid skill, they were corrected and required to re-demonstrate the skill. If an IC did not follow the order of teaching, as prescribed in the instructor's manual, they were immediately corrected, but not made to repeat their performance. When ICs did not use an EA technical vocabulary term, they were not required to repeat their performance, nor were they consistently corrected immediately. Alice corrected several ICs at one time for not saying the words, "action guide".

How ICs Changed Over Time

Findings about how ICs changed their skills and attitudes about EA over time were discovered by comparing ICs' presocialized characteristics and their scores of socialization during training. ICs' presocialized

characteristics were their expectations for training, experiences in teaching first aid, relationships with EA, and self-interests. ICs' socialization scores reflected their plans to conform to EA's rules. These scores were based on ICs demonstrating conforming behaviors for Alice and their statements of plans not to conform in conversations with other ICs.

By comparing ICs' presocialized characteristics and scores of socialization during training, similarities were found between the ICs who conformed and those who did not conform. ICs' who demonstrated conformity during training, as indicated by high or moderate socialization scores, were found to have similar pre-training expectations, similar perceptions of their experiences in teaching first aid, and similar relationships with EA.

Hanna, Nancy, and Rick had similar expectations for training, perceptions of their experiences in teaching first aid, and conformed during training. Hanna's actual experiences in teaching first aid were more similar to the other seven ICs' backgrounds than to Nancy's and Rick's experiences. Hanna was experienced in teaching first aid and Nancy and Rick were inexperienced in teaching first aid. Hanna's feeling about the appropriateness of her experiences in teaching first aid made her similar to Nancy and Rick. Hanna's pre-training statement, "I want to drop the old and

learn the new", was interpreted to mean that she thought her old experience was insufficient. She, like Nancy and Rick, indicated that they wanted to learn as much as possible during training.

Robert, George, Ann, Debbie, Charlie, Larry and Mac had similar expectations and experiences in teaching first aid, but conformed differently during training. Robert, George, Ann, Debbie, Charlie, Larry, and Mac thought that training was unnecessary for them to be able to teach a first aid course. There was no evidence that this expectation changed during training. Debbie and Mac conformed during training. Robert, George, Ann, Charlie, and Larry expressed their plans not to conform in conversations with other ICs.

Rick and Nancy entered training with no experience in teaching and little first aid experiences. They entered training without any experiences with EA's rules for teaching. The first aid skills taught in the course appeared not to conflict with their prior experiences. They demonstrated conformity during training.

Hanna, Debbie, and Mac were the ICs who were experienced in teaching first aid, knowledgeable about EA's rules for teaching, and conformed during training. In their pre-training interviews, Hanna, Debbie, and Mac discussed previous conflicts with EA's rules and EA's

expectation that instructors conform to these rules. They stated their resolve to conform, even though they disagreed, because EA was accepted as the standard for first aid instruction. During training, Hanna, Debbie, and Mac demonstrated EA's required first aid and teaching skills. Hanna and Debbie used both of EA's technical vocabulary terms. Mac said "911". His practice teaching session did not contain action guides, so he did not say "action guide". Hanna, Debbie, and Mac changed the way they led their practice teaching from their pre-training descriptions to the way EA expected instructors to teach.

The remaining ICs, who did not conform, were experienced in teaching and had different pre-training relationships with EA. Robert, George, Ann, and Larry, who expressed nonconformity and non-acceptance of EA as the standard, were found to have: (a) pre-training experiences that were brought into conflict with EA's rules; (b) no pre-training attitude of accepting EA as the standard for first aid instruction; and (c) no conversion to conformity during training.

George and Larry were previously certified instructors for EA. Prior to training they discussed their conflicts with EA's rules and how in the past they did not conform to EA's rules. During training, George and Larry demonstrated the required first aid skills for Alice. In conversations

with other ICs, they indicated that they planned to teach against EA's rules. During training, George and Larry did not change their pre-training attitudes of nonconformity to EA's rules.

Robert and Ann were experienced in teaching first aid for another organization. They had no previous experiences with EA's rules. Therefore, before training, they expressed no conflicts with EA's rules. In training, Alice presented cues that conflicted with Robert's and Ann's expectations about first aid. Robert and Ann talked with each other about their conflicts. They resolved not to conform and to teach against EA's rules. During training, Robert and Ann changed their first aid skills in order to pass the skills demonstrations sessions. They did not demonstrate a change in the way they expected to teach. During training, they expressed an attitude of nonconformity.

Charlie was an experienced instructor, but not in first aid or teaching for EA. Before training, Charlie expressed a pre-training attitude of conforming to EA's rules. He said, "I am going to do what I am told." During training, he demonstrated the required first aid skills, used technical language, and taught according to EA's rules. Charlie demonstrated a change from his pre-training plans to encourage student participation to Alice's cues of limiting student participation. Charlie agreed not to

conform with EA's face mask rule in a conversation with George. This agreement to teach against EA's rules illustrated a change in Charlie's pre-training plans to conform to plans not to conform.

A change in the ICs' self-interests was found in the ICs' teaching activities or plans to teach 30 days after training. Before training, Robert, Hanna, Nancy, George, Rick, and Charlie mentioned plans to teach community courses, as well as courses at their place of employment. All of the courses taught or planned 30 days after training were at the ICs' workplace. Robert, Hanna, and George taught courses and Rick had one course scheduled. The remaining ICs said that they would teach a course at work sometime in the future. No community courses were taught or planned. ICs were found to teach only work-related courses.

Changes in Debbie's and George's attitudes about conformity and EA were found in their discussions about teaching 30 days after training. No change was found in Robert's, Hanna's, Nancy's, Ann's, Rick's, Charlie's, Larry's, and Mac's attitudes about conformity after training. Debbie became less willing to conform after training when she faced a new and unresolved conflict with EA's rule about charging 30 dollars for each student in her basic first aid course. She expressed uncertainty about conforming to this rule. Her attitude about EA became more

negative. George expressed a change in his attitude from nonconformity to conformity after training. He said that he conformed and did not teach the use of face masks to his students. His attitude about EA improved after training.

Language Usage

Language cues and symbols were used by Alice to deliver messages about expected behaviors. ICs used language to express their feelings and level of acceptance of EA's cues.

The cues about the content and the order of teaching were overtly stated, demonstrated, and consistently reinforced by Alice. ICs were told to "follow the book" and "teach by the book". ICs were told to say, "911" and "action guide". They were corrected when they did not say these terms, or when they used medical or paraprofessional terms (e.g. "xiphoid", "EMS', and "shake and shout").

ICs were told to communicate with EA by using written forms. These forms, and the manner in which they were explained, told ICs how to report their teaching activities and how EA controlled and monitored their teaching activities. ICs were told that when they listed too many or too few people on a course record form, EA knew they were breaking a rule. ICs were told that, if they did not complete the forms on time and correctly their authorization to teach would be revoked. The revoking of their authorization to teach was the sanction for not following the rules.

EA's organizational characteristics were illustrated in Alice's lecture about the forms. EA was described as an organization that (a) expected ritualistic performance and (b) had little control over its workforce. Examples of this during training were: Alice's verbal demands that ICs follow EA's rituals for first aid skills and practice teaching sessions and her explanation of the sanction of revoking an instructor's authorization, <u>if</u> the instructor was caught. ICs' statements about plans to teach against EA's rules were evidence that they knew that EA did not control their behavior.

The two characteristics about EA not described in training were the control mechanisms typically used in normative organizations. Normative organizations controlled their workforce by (a) developing in members an acceptance of professional norms through pride and commitment to the organizational philosophy and social activities; or (b) selecting members to be eligible for training who held professional norms consistent with those of the organization. Activities for ICs to develop acceptance of professional norms through pride, belief, and commitment to EA's organizational philosophy and social activities were not found in training. ICs were not selected to participate in training based on their professional norms being consistent with professional norms expected by EA.

Alice's use of body language was found to reinforce her messages to ICs. When Alice corrected an IC, she stood directly in front of them, when they were seated, and over the ICs, when they were on the floor. The different ways in which Alice answered Mac's questions sent different messages to ICs. In response to his first question about the class size rule, Alice stood up from her seated position behind the desk and walked to the center of the room and answered the question. While answering the question, she made eye contact with different ICs and gave the answer to all ICs. When Alice answered Mac's second question, about geographic jurisdictions for teaching, she rose from her seated position and walked directly in front of Mac. She looked him in the eye and asked him to see her after class. She did not give the answer to the entire class. The first answer was delivered in a way to imply everyone's interest and access to the answer. The second answer was delivered in a way that implied only Mac's interest and to give the answer to only Mac.

Alice used nuance of language to denote her membership in EA. She used the word "we" and "our" several times during training. She said, "We want feedback....It is the order we laid out for you....We do it this way....Our methods....Our instructors..." She did not instruct ICs to use specific words that denoted their membership in EA.

ICs responded to Alice's cues through verbal and nonverbal language. The way in which the ICs conformed without correction, conformed after corrections, or were disruptive in class sent nonverbal messages to Alice. Through ICs' silence, sighs, and comments to other ICs after being corrected by Alice, they sent messages that they would conform even though they did not want to conform. They did not use overt verbal language to express to Alice their plans not to conform after training. By demonstrating the prescribed behaviors, all ICs sent the message to Alice that they were conforming to her expectations. Robert, George, Ann, Charlie, and Larry told each other, not Alice, that they did not plan to conform after training.

Hanna, Debbie, and Charlie were cooperative during training and demonstrated the first aid skills, including the technical vocabulary terms without correction. They gave no messages of negative feelings or conflicts with EA's expectations for their behavior. Robert, Nancy, Ann, Rick, George, and Mac were silent, sighed, or made comments to other ICs after being corrected. Larry frequently disrupted class.

The ICs use of nuance of language did not denote membership in EA. ICs' nuance of language denoted an individualistic orientation to teaching, or membership in a different organization than EA. Hanna, Nancy, Rick, Debbie,

Charlie, and Larry used the word "I" when leading the practice teaching session (e.g. I want you to use this technique). During training, Robert's, George's, Ann's, and Mac's use of technical terms, first aid skills, and the word "we", inferred membership in LSO not EA. There was no change in ICs' use of nuance of language during, or after, training to represent a change in their orientation to a committed EA professional.

ICs sent verbal and nonverbal symbolic messages about training and EA through the different ways they handled the EA certificates and instructor's name badges. This differential treatment of the certificates and name badges sent a symbolic message that the certificate was more important than the instructor's name badge. Each IC dropped the instructor's name badge in their bags containing their roller bandages and disinfectant. No IC made a statement about putting the name badge in a safe place. This implied that the name badge, the visual indicator of membership in EA, was less important than the completion certificate.

Structure and Conduct of Training

The formal structure and conduct of training was controlled by Alice. She told the ICs what to learn and how to learn it. ICs were not given the opportunity to negotiate the learning objectives, nor course activities with Alice. The findings were organized into categories

reflecting Knowles' andragogical process model for training adults. This model is based on the assumption that training participants are independent learners who desire active involvement in learning. They are not dependent learners for whom the knowledge and skills and learning activities are decided in advance of training without their input (Knowles, 1984, pp. 49-63 & 115-117).

Two andragogical concepts of encouraging ICs' need to learn and their participation as mutual resources for learning, were built into the training design, but not supported by Alice's conduct of training. The training was structured to allow ICs to share and learn from each other in the practice teaching sessions and skills demonstrations sessions. Alice closely monitored how ICs led their practice sessions. She did not allow ICs to share their personal experiences during training and told them not to allow their students to "tell war stories". Alice told ICs, "As instructors, whether you like it or not, you need to go by the book. Otherwise, they [students] may pick up our bad habits and we all have them". In this statement she implied that ICs previous experiences resulted in "bad habits" that were not acceptable to EA.

The tests given at the beginning of the course could have reinforced ICs' motives for learning during training or been used by Alice to assess the ICs' knowledge about the

topic. Because all ICs passed the test, most with high scores, and Alice required all ICs to participate in all aspects of the course, the tests did not appear to reinforce ICs' need to participate, nor be used by Alice as a signal about how and what to teach.

Andragogical concepts to improve ICs' enjoyment, participation, and learning during training were not reflected in the trainer's conduct of training. Her frequent corrections of ICs in front of other ICs, and statements that their previous skills were wrong, created a climate in which ICs were not respected and were threatened. Alice did not allow ICs to negotiate the learning objectives nor learning activities of the course.

Before training, ICs were found to have established feelings about why they needed to know first aid, their readiness to learn, and their motivation for teaching. Each IC thought that knowing first aid was important. They had definite immediate plans about when and where to teach first aid. They stated internal and external motives as reasons for teaching first aid. ICs said that they wanted to teach friends or co-workers. They did not say that they wanted to teach because EA needed instructors.

ICs demonstrated their dislike of being treated as dependent learners through their participation during training and their comments after training. During training

ICs revealed their independence by: (a) demonstrating skills at their own pace, not the trainer's pace; (b) ignoring the trainer's cues to read from the book and to underline; (c) solving their conflicts and questions about EA's rules in conversations with each other; and (d) ignoring Alice's cues to limit student's sharing of their experiences during practice teaching sessions. All ICs described training as "too long" and "boring". Robert's, George's, and Ann's voice tones and comments about being required to demonstrate the skills exactly as Alice taught implied their acknowledgment of and dislike for EA's treatment of them as dependents. Ann's comment, "You had to do everything her way!", was representative of Robert's and George's comments.

The informal conversations during training were not controlled by Alice, nor did she appear aware of the informal learning taking place during these. These conversations occurred during the morning and afternoon breaks, lunch, and during or after skills demonstrations sessions. During these conversations, ICs shared their first aid experiences and sought advice about their conflicts with EA's rules and how to teach older adults. Robert, George, Ann, Charlie, and Larry talked with each other about emergency techniques and EA's rules about student books and using face masks. Robert, George, Rick, and Mac talked with the observer and each other about how

older adults learn.

Based on these findings, conclusions and recommendations about changes in policy, personnel recruitment, and training of EA first aid instructors and areas for future research were made. These are reported in chapter 10.

CHAPTER 10

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This chapter presents a summary of the research activities and principal findings related to training as a socialization process. Conclusions pertinent to new or renewed insights into socialization, adult education, and voluntary organizations are offered for consideration. Recommendations to improve training as a positive and productive socialization process for EA first aid instructors, as well as to encourage future research, are presented for the reader's consideration.

Summary

Previous studies in socialization, adult education, and voluntary organizations presented unanswered and unexplored issues to be researched. Socialization studies focused upon the effectiveness of socialization programs, not developing an understanding of the socialization process. Adult education literature contained prescriptions for training adults in voluntary organizations, but not a comprehensive examination of training as a socialization process of adult volunteers. Researchers of voluntary organizations have examined volunteer characteristics, organizational roles, and volunteer contracts. The training process to prepare volunteers for an instructor role in an organization has not been systematically investigated as a socialization process. These above unanswered and unexplored issues were examined

herein.

The problem investigated in this research was, "what was the training process through which volunteers were socialized into their roles as instructors and how did this process work?" The questions which guided the research were:

1. How did the ICs' expectations for growth interact with the trainer's expectations over time?

(a) How did adjustments in expectations occur; what kind of resistance to change in expectations occurred?

(b) How did the trainer adjust the training to respond to the interaction caused by different expectations among the ICs?

2. How did the ICs with varying perceptions of their skill level before training, change in skill levels, change in expectations, and change in attitudes over time?

3. How did language function as a mediator of socialization?

4. How did the trainer's structure and conduct of training hinder, or facilitate, the socialization process?

The sample was purposefully chosen to gain insights about volunteers' progress through this socialization process. Ten individual cases were studied as they progressed through an EA first aid instructors course.

Pre-training interviews were conducted with EA officials, three administrators, and one trainer. From these

interviews information about the officials' expectations was gathered. Case studies about the 10 ICs were developed from data collected, following interview and observation schedules. The ICs were interviewed before and after training. From the ICs' pre-training interviews, ICs' pre-socialized characteristics, including expectations for training, were gathered. From the training observations, information about the interactions of ICs' and trainer's expectations over time, changes in ICs over time, language as a mediator of socialization, and the structure and conduct of training were found.

Various techniques were used to improve the validity and dependability of results. As a check for validity, ICs were asked to review and comment on the training description and their own case study. Elizabeth, an administrator for EA, reviewed the training description, the case studies, the results, and conclusions chapters. In order to ensure the confidentiality of the ICs, Alice was not asked to be the reviewer. Elizabeth was qualified to review the material because she was training chairman for the EA council and she taught a first aid instructors course with Alice two weeks after Alice taught the course examined in this study.

As a control for authenticity, two different data sources, field notes and audio tapes, were transcribed. The investigator analyzed quotes from the original transcripts

and field notes, not summaries. Investigator's bias was controlled by clarifying the researcher's assumptions before the study. A content and process audit trail was established by describing how data were collected, analyzed, and categorized. A record of emerging insights and category development was kept in an investigator's log.

The investigation, guided by the four research questions, generated a series of findings, conclusions, and recommendations with policy, procedural, and program implications. Recommendations for further research and application of insights pertinent to the socialization process of the EA first aid instructors course were generated for consideration and possible action in the future.

Principal Findings

The findings of the investigation were:

1. The ICs' expectations were different from the trainer's expectations. Three ICs wanted to learn as much as possible during training. Seven ICs thought training was unnecessary for them to be able to teach the basic first aid course. The EA officials and trainer expected ICs to learn the skills necessary to teach the EA basic first aid course. The interactions of these different expectations were illustrated in the ICs' and trainer's behaviors and attitudes during training.

The training process did not meet the ICs' expectations about how a training should be conducted. All of the ICs' expectations about teaching and some of the ICs' expectations about first aid were not met. ICs did not appear to adjust their expectations during training, but instead demonstrated the required behaviors for the trainer.

Three ICs demonstrated the required behaviors without being corrected, thereby indicating the least resistance to EA's desired change. Three ICs demonstrated the desired behaviors, after the trainer corrected them. Three ICs demonstrated the desired behaviors, after being corrected and questioning the correctness of EA's standards. Their behavior change did not continue throughout training. One IC demonstrated the minimally desired behaviors of correct skills demonstration. And he was disruptive and uncooperative during training.

The trainer did not adjust the content, nor the way in which she expected to teach the first aid instructors course. She taught the skills that she thought instructors needed to teach the EA basic first aid course. These were for ICs to be dependent on the instructor's manual for the first aid skills, order of teaching, and teaching techniques. The trainer expected ICs to change their behavior and skills and to accept EA standards for teaching first aid.

2. A pattern between the pre-training characteristics of the ICs who conformed and planned to teach according to EA's rules, and those who did not conform and planned to teach against EA's rules, was found. ICs with different pre-training perceptions of their skill levels and relationship with EA were found to exhibit different changes in behavior and attitudes about conformity over time.

The three ICs who perceived a need to learn in training demonstrated conformity during training. Two of these three ICs, entered training inexperienced in first aid and teaching, and planned to conform during and after training. The third IC, entered training experienced in teaching first aid, but with a perceived need to learn from training. She also conformed during and after training.

Of the seven ICs who perceived their pre-training skill level as adequate to teach the first aid course without taking the instructors course, two conformed (did not express plans to teach against EA's rules) and five did not. Two of these ICs, who did not think training was necessary for them to be able to teach and entered training with a pre-training attitude of accepting EA as the standard for first aid instruction, conformed. The other five, who felt training was unnecessary for them to be able to teach first aid and did not enter training with an attitude of accepting EA as a standard for first aid instruction,

expressed plans not to conform to EA's rules.

Two of the ICs' attitudes about conformity and EA changed after training. One IC, who was cooperative and conformed without correction during training, expressed a negative attitude about conformity and increased negative feelings about EA after training. One IC, who entered training with plans not to conform and expressed his plans not to conform during training, changed these plans after training and taught according to EA's rules: his opinion of EA appeared to improved after training.

3. Through verbal, nonverbal, overt, and subtle cues, messages were sent to and from the trainer and ICs. Most of the language cues given by the trainer were cues about overt behaviors. These cues described how instructors were to communicate with EA, the content and activities of the first aid course, and the use of technical vocabulary terms. Alice subtly used nuance of language to signify her membership in EA.

ICs' language signified their acceptance, or rejection, of EA's expectations. Even though all ICs performed the required first aid skills in front of Alice, some of their nonverbal body language indicated their negative attitudes about changing their behaviors to conform to EA expectations. Verbally, some of the ICs told each other that they were not planning, after training, to conform to

EA standards. No IC used nuance of language to signify membership in EA.

4. The trainer controlled the formal structure of training. She determined the content and activities of training without input from ICs. The structure and conduct of training treated all ICs the same, regardless of their different teaching and first aid experiences, or experiences with EA. All of the ICs, inexperienced or experienced in teaching first aid, were required to participate in every training activity.

ICs came into training with established feelings about their motives for participating in training and for teaching after training. During informal conversations, ICs met their needs to serve as mutual resources for learning and to solve problems with EA's rules. In these informal conversations, ICs expressed plans not to conform to EA's rules. The trainer did not control, nor appear aware of, the informal learning that occurred between ICs during these conversations.

Conclusions

The study's findings provided support for conclusions about (1) differences in ICs' and the trainer's expectations; (2) how ICs' pre-training characteristics predisposed their level of participation in training; (3) the trainer's ability to lead a training as a socialization

process; (4) training components needed for a socialization process; (5) language as an inhibitor of socialization; and (6) post-training evidence about the socialization of instructors. From the findings and conclusions, recommendations about the ICs and the first aid instructors course were made.

The expectation that training was going to be a socialization process was not mutually held by the trainer and ICs. Alice expected training to be a socialization process and ICs did not. Alice expected training to be a socialization process in which ICs changed and accepted EA as the standard for first aid instruction. Seven of the ten ICs, seemed to expect training to be a vehicle of certification. They did not think that training was necessary for them to be able to teach a basic first aid course. A certification process was an affirmation of their existing skills and experiences. They did not expect a socialization process to change their skills or to develop an acceptance of EA as the standard for first aid instruction.

ICs' pre-training experiences in first aid and with EA's rules appeared to predispose them for cooperation or difficulty during training. The two ICs with no experience in teaching, nor with EA's rules, appeared to have no difficulty during training. Their past experiences did not

appear to conflict with EA's teachings. Their newness to the first aid field appeared to predispose them to cooperate during training. The one IC with experiences in teaching first aid that she percieved were inadequate, thus needing to learn during training, entered training with the attitude of accepting EA as the standard. When something in her background was brought into conflict with the teachings of EA, she conformed. Her pre-training attitude of accepting EA as the standard, predisposed her to cooperate during training.

The seven ICs, who thought they didn't need training, appeared to have experiences in their backgrounds that were brought into conflict, during training, with the teachings of EA. Their pre-training first aid experiences and their prior experiences with EA's rules appeared to predispose them for cooperation or difficulty during training. Two of these seven, who were experienced in teaching first aid and who held a pre-training attitude of accepting EA as the standard for first aid instruction, appeared to be predisposed to cooperate and follow EA's rules during training.

Another two ICs, of the seven who thought training was unnecessary, were experienced in teaching first aid and held a pre-training attitude of not accepting EA as the standard for first aid instruction (thereby not conforming). They

appeared to be predisposed not to cooperate or follow EA's rules. The two ICs, who entered training experienced in teaching first aid but not experienced with EA's rules, did not enter training accepting EA as the standard for first aid instruction. Their pre-training experiences of teaching first aid and inexperience with EA's rules (thus no attitude of accepting EA as the standard), appeared to predispose them for difficulty during training. Without a pre-training attitude of accepting EA as the standard and without developing such an attitude during training, when EA's teaching conflicted with their previous experiences, they decided to teach against EA's rules.

The final IC of this seven, was experienced in first aid, but not teaching first aid nor with EA's rules for teaching. He entered training with the attitude to conform and teach according to EA's rules. He appeared to be predisposed to cooperate during training and did so until another IC pointed out that teaching EA's way conflicted with the expectations of his employer.

The ICs, who were predisposed with pre-training attitudes of accepting EA as the standard, or predisposed through their inexperience in teaching first aid, responded by accepting EA as the standard and conforming to its rules. The ICs without these predisposing, pre-training characteristics demonstrated the required behaviors for the

trainer. But, these behaviors were often demonstrated reluctantly and with an attitude of expediency or cynicism in order to gain certification.

Based on these pre-training characteristics, predisposing behavior and attitudes during training, it appeared that the trainer's structure and conduct of training should have explicitly included activites to develop pride, belief, and loyality to EA organizational goals and activities. Or these characteristics should have been selection criteria for ICs to participate in training. This conclusion is supportive of Etzioni's (1975, pp. 250-251), Sonn's (1975, p. 3149), and Wuthrow's (1986, p.124), proposition that acceptance of professional norms is a pre-training characteristic for which trainees should be selected to participate in training and Adams' (1983, p. 34) and Etzioni's (1975, p. 19) proposition that the amount of socialization needed is dependent on the selection criteria used to allow ICs to participate in the first aid instructors course.

The ability to solve conflict and instill values of the organization in the ICs appeared to be lacking in Alice's preparation or activities as a trainer. The trainer appeared unable to implement training strategies that facilitated both socialization and practical skill acquisition. The trainer expected ICs to change and

accept EA's teachings. As ICs appeared to resist change, she appeared to make explicit an objective that ICs must accept EA as sacrosanct and its teachings as standards for first aid instruction. She seemed unaware of how to deal with the ICs' motives and attitudes of resisting change. She became more entrenched in the absoluteness of teaching according to "the book". The trainer appeared inadequately prepared to convert ICs' resistance into acceptance of EA's norms and activities.

The trainer's acceptance of demonstrated overt behaviors as the criteria for successful completion of training, implied her lack of understanding about the control mechanisms operating within voluntary organizations. Voluntary organizations have little direct control of their workforce. They must rely on a selection criterion for its workforce or commitment of its workers to professional norms of the organization as the mechanism to assure conformity (Adams, 1983, pp.34-37; Etzioni, 1975, p. 19). The absence of either a selection criteria or training activities to develop loyalty and commitment to the organization's values, may have been critical factors in EA certification of some instructors who were not committed representatives of the organization and who would not teach the course as written.

A training in a voluntary organization that develops skill competencies, measured by overt behaviors, does not

necessarily reflect a socialization process that develops a commitment to the norms and activities of the organization. This training's emphases on rote learning of instrumental, job skills, did not appear to be a socialization process that encouraged trainees to accept and conform to the values and skills of the organization. Some of the ICs' overt behaviors were accompanied by individually expressed intentions not to teach according to EA's rules and to selectively adapt EA's teachings according to their own rules. Training appeared to fail to instill, in some ICs, the need or desire to persist in teaching according to EA's rules. The absence of training activities that explicitly discussed the reasons and questions about conformity and to develop loyalty and commitment to the organizational values and social activities, may have been the missing components of training that were needed to encourage all ICs to conform and teach for EA.

Language was not a facilitator of the ICs' socialization process. Language could have been a facilitator and an indicator of the socialization process (Patton, 1980, pp. 147-148; Tannenbaum & McLeod, 1967, p. 4). In the training of ICs, language did not appear to be a bridge to socialization, but a barrier, and a visible indicator of separation between the trainer and ICs. The trainer did not explicitly encourage ICs to use nuance of

language (i.e. "we" and "our") to indicate that they were members of EA. The trainer's use of the terms "we" and "our" in declarative statements demanding conformity appeared to create a distance, instead of a closeness, between the trainer and ICs. The trainer's use of language did not extend a collegial invitation, into the EA organization. Many of the ICs' lack of use of technical terms and all of the ICs' lack of use of nuance of language to indicate membership in EA, implied their lack of perceived membership, or acceptance, of the socialized role for instructors in EA.

The difference in language usage symbolized a difference in the trainer, the socialized role model, and the ICs, the role aspirants. ICs were not found to change their language to emulate the socialized role model of the trainer. Such a lack of emulation may have reflected a lack of desire by ICs to be members of EA, or to be like the trainer.

The way the trainer conducted training appeared to undermine the socialization process and may have contributed to ICs' turning to each other for clarification of points that the trainer declared (not allowed to be discussed) in training. The trainer's treatment of ICs as dependent learners did not allow for discussions of their prior experiences, "bad habits", that conflicted with EA's

teachings. When ICs could not meet their needs as independent learners during the formal activities of training, they turned to each other in informal conversations. In these conversations, they solved their problems and shared past learning, which were not acceptable to EA's standards. This informal sharing of their skills and knowledge among ICs was not acceptable to EA's standards, thereby undermining the intent of the socialization process to develop organizationally acceptable skills and knowledge and conformity.

The ICs' teaching activities and plans appeared to indicate a minimal commitment by ICs to EA. Thirty days after training, only four ICs taught, or planned to teach, a first aid course. All of these scheduled courses reflected an occupational self-interest. No community courses, were taught or scheduled. No IC indicated a desire for additional training, activity on behalf of EA, or advancement in the EA organization.

Recommendations

Based on the above findings and conclusions, recommendations for the improvement of the EA first aid instructors course, as a socialization process, crystallized. Recommendations for related research producing a greater understanding of socialization, adult education, and voluntary nonprofit management also emerged.

Recommendations for the improvement of the EA first aid instructors course as a socialization process are:

1. Training components which help ICs to strengthen, or develop, their commitment to EA's professional norms and social activities should be included in training of first aid instructors. Allow discussions during training for ICs to express their attitudes about conformity and accepting EA as the standard for first aid instruction. ICs could discuss why they thought the rules were impractical. Through such discussions ICs might develop an understanding of the rationale for the rules. This understanding might lead to an increase in ICs' acceptance and adherence to EA's rules. By presenting images of volunteer heroes and important historical and current volunteers serving to help strangers in the community, as well co-workers, the ICs might develop a pride, loyalty, and commitment to EA's social activities beyond their workplace.

2. The focus of training should be shifted toward a "goodness of fit" socialization perspective which meets the needs of ICs, as well as EA. A "goodness of fit" perspective reflects a negotiation of ICs' and organizational expectations for training and subsequent outcomes after training. Such a shift would include identifying ICs' objectives for training and obstacles about conforming before or during training. If these objectives

and attitudes cannot be addressed in training, then the rationale for not addressing them should be explained.

3. EA should design training with alternative strategies for instructing ICs with different pre-training knowledge, skills, and attitudes. Such alternative strategies would pretest ICs for their knowledge and attitudes and assign ICs with different backgrounds to appropriate learning activities. The inexperienced ICs, who need more time than the experienced instructor to learn the skills, would concentrate on learning and correctly demonstrating skills. The experienced ICs, who quickly demonstrate the desired skills, could spend time in discussions with an EA official about the practical implications of following EA's rules in their workplace or their questions about EA's position as the standard for teaching first aid.

4. The trainer should explain the rationale of language usage and EA's rules. In order to develop professional language, the cues for technical and membership language need to be overtly presented and consistently reinforced during training and attitudes about membership needs to be discussed. To achieve this goal, the trainer should explain the rationale of language usage and EA's rules. The language in the instructor's manual should be

changed to reflect a corporate EA orientation (i.e. use of "we" instead of "I"). The trainer should explain to the ICs how their use of language reflected previous experiences in teaching first aid, or an individualistic orientation towards teaching. The trainer should give concrete examples to ICs about changing their language to reflect membership in EA. With the explanation of how to use language to denote membership, the trainer should also explain and allow discussion about why ICs would want to change and use language denoting them as a representative of EA. The trainer should explain that when instructors use language reflecting their membership in EA, they appear as credible and legally sanctioned instructors. The foundation for such credibility and EA's rules is that legal courts and insurance companies accept EA as the standard for first aid instruction.

5. The structure and conduct of training should be changed to be more supportive of ICs as independent learners. Include and support andragogical concepts in the structure and conduct of training. The conduct of training should treat ICs' former experiences with respect and build on these experiences. If the former experiences are not acceptable to EA, then explain the rationale for why ICs need to change and conform to EA. ICs' attitudes and experiences should be used to help each other during

training. Hanna, Debbie, and Mac could have explained to Robert, George, Charlie, Ann, and Larry why they conform even though they disagreed with EA's rules. Hanna could have shared her feelings about why she perceived her previous first aid teaching experiences to be inadequate and why she perceived a need to learn during training. Before a revised structure of training reflecting andragogical concepts is implemented, the trainers who will teach the course should participate in a refresher course on andragogical assumptions about adult learners.

The findings and conclusions of this study revealed a number of questions which can serve as foundations for future research. Several recommendations for future research include:

1. This study proposed and examined a training in the voluntary sector as a socialization process. Building on this research, other studies can examine the socialization process in other EA courses or other voluntary organizations. The control mechanisms for conformity in voluntary organizations and how ICs respond when the organization expects them to behave differently than their previous experiences merit systematic investigation. Findings from such research may serve as the beginning for functional descriptions of volunteers and guidelines for training and certifying volunteers.

2. The study revealed a conceptual similarity between the adult training principle of shared responsibility for learning and the socialization perspective of "goodness of fit". Future studies examining these concepts might produce unexpected findings about a common foundation for practice between adult education and socialization.

3. Future research should examine whether or not other trainees in different trainings meet some of their needs before training or during informal conversations within training. If trainees are found to meet their needs before and during informal conversations with other ICs, the extent to which these solutions are aligned with or against the norms of sponsoring organization merits investigation.

4. Questions for organizational researchers of voluntary nonprofit organizations were raised in this study. Questions were raised about the implied conformity inherent in Ellsworth's (1962, p. 887), Pearce's (1978, pp. 207-209), and Telep's (1986, p. 1884) proposition that contract clarity is a strong predictor of continued commitment. Potential questions in this area are: (a) do volunteers with clear contracts exhibit more conformity to professional norms of the contracting organization than volunteers with less clear contracts; and (b) how are the controls for conformity explained and reinforced in voluntary organizations?

5. This research raised questions about the acceptability of transferred skills among and between voluntary, business, and public sectors. With current trends of public, private, and voluntary organizations entering into joint projects to solve societal problems and more volunteers working in multiple organizations (Connor, 1989, p. 5), the concept of transferring organizational skills and attitudes from one organization to another becomes increasingly important. Future studies should examine the appropriateness of Lean's (1984, pp. 21-25) proposition that the goal of volunteer training should be to teach the transfer of previously learned skills. Visionaries, managers, and researchers of joint projects will need to identify the joint project's professional norms and its similarity and variance with the professional norms of the participating organizations.

In an increasingly global and complex society, American voluntary nonprofit organizations may be considered for initiatives in education and community service. Volunteers will participate in training programs as preparation for these initiatives. This study offered qualitative insights about trainees' consistencies and changes during a training examined as a socialization process. The recommendations for further study suggest questions and insights that, if pursued, offer better understanding and increased

appropriate utilization of socialization processes to improve the training for volunteers who choose to impact another life, or a whole society, by serving as an instructor.

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PERSONAL COMMUNICATIONS AND SELECT INTERVIEWS

Asche, J., Extension Specialist, Virginia Polytechnic Institute and State University, November 20, 1987.

Bachman, P., Training Associate, American Red Cross National Headquarters, February 12, 1988.

Brinkley, D., Director of Training, YWCA of the USA, National Board, August 5, 1988.

Bryce, H., Professor, William and Mary School of Business, August 6, 1988.

Cale, S., Director of Training, March of Dimes National Headquarters, March 17, 1988.

Diener, P., Director of Training, American Cancer Society of Metropolitan Washington, D.C., March 17, 1988.

Evans, E., Director of Volunteers, American Red Cross, Washington, DC., October 18, 1988.

Ferrell, J. Director of Program Services, YMCA of the USA National Headquarters, November 12, 1988.

Hankin, M., Training Associate, American Red Cross, National Headquarters, November 23, 1987.

Hillman, R., Director of Training, National Association of Junior Leagues, November 9, 1987.

Hussey, S., Director of Programs, Girl Scouts, U.S.A. National Headquarters, November, 6, 1987.

Lavin, D., Volunteer, American Heart Association National Headquarters, November 27, 1987.

Merton, J., Director of Training, Boys Scouts of America National Headquarters, November 7, 1988.

Morrill, P. Volunteer Chairman, Junior League of the City of Washington, D.C., March 3, 1988.

Plambeck, D., Private Nonprofit Consultant, Washington, D.C.October 9, 1988.

Quinn, J. Director of Program Services, Girls Clubs of America National Headquarters, November 17, 1988.

Showronek, S., Director of Training Programs, CampFire Council of Washington, D.C., March 14, 1988.

Silva, S., Research Associate, American Red Cross, National Headquarters, December 5, 1987.

Workcuff, R., Volunteer in Girl Scouts, U.S.A. and American Red Cross, Kansas City, Mo., July 24, 1988.

APPENDICES

APPENDIX A

INTERVIEW SCHEDULE FOR ADMINISTRATOR AND TRAINER

Introduction:

"Thank you for helping me with this important study, spending your time, and sharing your thoughts with me. As I stated in my letter and over the phone, the purpose of this research is to describe the process of an instructor training course. During this interview, I want to document your expectations for the first aid instructors course.

"All your statements will be confidential. In order to preserve you anonymity, in the final report your name, the course name, location, and even the name of the sponsoring voluntary organization will be changed. I need to tape this interview, so that I can concentrate on listening and have the tape take the detailed notes. I have a few questions to start our conversation, but we aren't limited by these because it is your perspectives, feelings, and ideas that are important. Do you have any questions? (Answer the questions, if there are any.) Okay lets get started."

1 Tell me a little about yourself and your job.

- Do you train as a volunteer or is it apart of your paid employment?
- Do you have any volunteer activities? If yes, what do you do and for what organization?
- How did you get interested or started in volunteering?
- What are your duties as an administrator (or trainer) for EA?
- What are your toughest challenges as an administrator or trainer for EA?
- How long have you been doing this?
- How has the program and your job changed over the years?

2. Let's talk about volunteers.

- What difference do volunteers make to the EA First Aid program?
- What changes have you seen in the volunteers who instruct first aid courses? (If new-tell me about the volunteers who instruct these first aid

courses?)
Who are instructors and how are they recruited?
What are the background and experiences the instructors and trainers bring to the classes?

3. Tell me about teaching.

What makes a good instructor and a not so good (undesirable) instructor.
Describe for me a model or ideal volunteer first aid instructor?
What do you do about instructors who don't fit your description of a good instructor?
What are some of the activities of an instructor in a first aid course?
Name a few of the challenges (tough spots) during teaching the course?
What do the instructors do in these situations?

4. Tell me about the course.

Have there been any recent changes to the course content? What are they and what do you think about them?
Have there been any changes to the way the course is taught What are the changes and what do you think about them?
Have there been any changes in the students that you have noticed? If so what are these and how do concerns?
Are the any problems about the way the course is currently structured?
Do you have any concerns about the course, the content, or the way it is taught?

5. Is there anything else you want to add?

Conclusion: Thank you for your time, attention, and helpful insights. Your effort is not only appreciated by me but by anyone who may benefit from what you helped me to understand better.

APPENDIX B

INTERVIEW SCHEDULE FOR INSTRUCTOR CANDIDATES

Introduction: "Thank you helping me with this important study, spending your time, and sharing your thoughts with me. As I stated in my letter and over the phone, the purpose of the research is to develop a description of an instructor training course.

"All your statements will be confidential. In order to protect your anonymity, in the final report your name, the course name, the location, and even the name of the voluntary organization will be change. I need to tape the interview, so I can concentrate on listening and have the tape take the detailed notes. I have a few questions to ask, but please don't be limited by the questions, because it is your feelings and ideas that are important. Do you have any questions? (Answer the questions, if there are any.) Okay lets get started."

1. Tell me a little about yourself.

   Are you employed?
   What are some of your community activities?

2. Tell me about your volunteer activities.

   What are some of your volunteer activities?
   How long have you been volunteering?
   How did you start volunteering? Why did you start?
   Does anyone else in your family volunteer?
   What does your family think about your volunteer activities?

   What do you like about volunteering? What is rewarding or interesting about volunteering?
   Is there anything that bothers you or you don't like about being a volunteer? If there is something that bothers you, how do you deal (overcome or compensate) with that?

   Have you volunteered for the EA before?
   Why did you to choose to be a EA volunteer?
   Why did you pick teaching first aid as your volunteer activity as opposed to any other activity?
   If a friend asked you, "What does the EA do?" What

would you say?
In what ways do you think volunteers make a difference in your community?

3. Let's switch to the topic of teaching.
Who is the most memorable teacher you've known and why?
Based on your most admired teacher, what skills and talents do you think are involved in teaching?

What kind of class (i.e. content and group of personalities) do you think would be the most challenging?
What demands would this class make on the teacher?
How would you handle this situation?

Have you taught before? What was it like to teach? (If answer was no then ask have you ever led a group before-do you think this will be like teaching?)
What do you like about teaching? (If inexperienced, what do you like best about the idea of teaching?)
When you are teaching is there anything that you can do to make this happen?
Is there anything you don't like about teaching? (If inexperienced is there anything when you think about teaching that bothers you?) As a teacher or leader, how do you handle this?

Is there anything different about teaching adults than children?
Do you do any thing different when you teach adults than children (i.e. structure the course or different teaching formats)?

Have you ever taught for the EA before?
If so which course? (If no, what interests you about teaching for the EA?)

What were (do you think will be) the greatest challenges in teaching this course? How did you handle this?
What did you like the most about teaching for the EA?
What do you like the least (or what problems) are there about teaching for the EA? How have you (or will) you do about this?

4. Let's talk specifically about the First Aid Instructors course?

Why did you pick this specific course (i.e. instead of CPR or nutrition)?

What kind of background (experiences, knowledge, or attitudes) do you bring to training?

Is there anything in the course that you are really looking forward to? If yes, what?

When you think about the course, is there anything that makes you a little nervous or uneasy? (If no, in other courses are there situations when you are a little uneasy?)

What have you done in other situations to overcome or deal with this?

5. Is there anything else that you would like to add?

Conclusion: Thank you for your time, attention, and helpful insights. Your effort is not only appreciated by me but by anyone who may benefit from what you helped me to understand better.

APPENDIX C

OBSERVATION SCHEDULE FOR VERBAL AND NONVERBAL CUES AND LANGUAGE USAGE

1. What are the spatial and environmental arrangements of training?

   What type of equipment and furniture is present?
   How are the walls decorated?
   What is the room temperature and lighting like?
   How large is the room and how are the people and equipment arranged?
   What are the reactions of the participants to the training facility?

2. What cues for appropriate behavior are given by the trainer?

   What are the verbal cues given?
   How are verbal cues given?
   When are verbal cues given?
   How do instructor candidates react to the verbal cues?
   What nonverbal cues are given?
   How are nonverbal cues given?
   When are nonverbal cues given?
   How do participants react to the nonverbal cues?

3. How does professional language develop throughout the course?

   What professional (EA) language is used by trainer?
   How is professional language explained to the ICs?
   How is the professional language used by the ICs?
   Throughout the course, during each hour, how many times was professional language used by the trainer?

4. What were the confusing, difficult, or unscheduled activities of the training?

   When, during the course, did confusing, difficult, or unscheduled activities or conversations occur?
   What were the topics of these activities or conversations?

APPENDIX D

OBSERVATION GUIDE FOR THE STRUCTURE OF TRAINING

1. How is the climate set?

   How does the course begin?
   How is the purpose of the course explained?
   How does the trainer introduce himself or herself?
   How are the instructor candidates introduced?

2. How is a structure for mutual planning and responsibility for learning established?

   How does the trainer explain his or her role in the training?
   How are the instructor candidates encouraged to ask questions, share experiences, and participate?
   How does the trainer interact with the instructor candidates during the first two hours of the course?
   How do the instructor candidates interact with the trainer during the first two hours of the course?

3. How are learning needs diagnosed?

   Are the objectives of the course presented as competencies?
   How is a model of instructor candidate competencies presented?
   What opportunities exist for instructor candidates to assess their personal competencies?
   What opportunities exist for instructor candidates to compare their personal competencies to the competencies of a model?

4. How are course objectives formulated to meet the needs of instructor candidates?

   How are the course objectives presented to the instructor candidates?
   How do the trainer and instructor candidates discuss the course objectives in the first hour of the course?

   What opportunities existed throughout the course

to discuss, add, delete, or change the objectives?

5. How are the program activities sequenced?

   What is the order of information presentation, skill practice, and testing activities?
   How are the activities integrated with each other?
   Does the difficulty of information, practice, and testing activities vary during the course?

6. Which learning experiences are in the training?
   How and what activities are discussed?
   How and what activities are summarized?
   What presentation techniques are used?
   What experiential learning activities are used?
   How are the practice sessions organized?
   What are the trainer's and instructor candidates' interactions during information presentations?
   What are the trainer's and instructor candidates' interactions during practice sessions?
   What are the trainer's and instructor candidates' interactions during the testing sessions?

7. How is the training evaluated?

   How and when is knowledge tested?
   How and when are skills tested?
   How and when does the trainer evaluate the instructor candidates?
   How and when do the instructor candidates evaluate the trainer?

APPENDIX E

TIMELINE FOR EA'S FIRST AID INSTRUCTORS COURSE

Time	Event	Minutes
800-820	Welcome and introduction	20
821-830	Slide history on Emergency Association	9
831-842	Discussion on types of services	11
843-853	Lecture using slides about Courses and Standardized System	10
854-900	Discussion of environment's affect on learning	6
901-930	Discussion of learning characteristics of adults	29
931-949	Lecture using slides on instructor duties	18
950-1005	Break	15
1006-1030	Discussion of group process and how to control a group	24
1031-1100	Discussion of teaching methods	29
1101-1106	Lecture on course's evaluation	5
1107-1152	Lecture about completing paperwork	45
1153-100	Lunch	67
101-110	Complete Instructor Agreement Form	9
111-130	Take and self-grade test on CPR skills	19
131-239	Lecture about instructor's responsibilities: administrative; knowledge; health precautions; cleaning mannequins; legal liabilities; accessing the emergency medical system; and overview of the first aid course	68
240-255	Break	15

256-300	Assignments of Practice Teaching (PT) units	4
301-325	Lecture on action guides	24
326-405	Continue review of action guides through questions and answers method	39
406-413	Lecture on contents of Appendices	7
414-430	Take and self grade test on first aid	16
431-445	Test summary and review of the day	14
	DAY 2	
800-805	Overview of the day	5
806-825	PT Larry-course introduction, 2 min. video	19
826-842	PT George-Emergency Action Principles, 5 min. video	16
843-930	PT Robert-practice assembling and cleaning mannequins	47
931-959	PT Rick-rescue breathing, 10 min. video, practice session, action guide	28
1000-1015	Break	15
1016-1025	PT Ann-obstructed airway conscious victim, practice session, action guide	9
1026-1043	PT Debbie-obstructed airway unconscious victim, practice session	17
1044-1050	PT Ann-obstructed airway action guide	6
1051-1059	PT Nancy-lecture on signs and symptoms of a heart attack	8
1100-1126	PT Robert-practice session on CPR, action guide	26
1127-1129	PT Mac-CPR test introduction	2
1130-1230	Lunch	60
1231-125	PT Mac-secondary survey, 10 min. video,	

	practice session	54
126-157	PT Charlie-bleeding and shock, 10 min. video, action guide	31
158-213	PT Ann-fire burns, 6 min. video, action guide	15
214-225	PT Nancy-chemical burns and cuts, no video, action guide	11
226-246	Break	20
247-322	PT Hanna, 15 min. video, practice session, action guide	35
323-332	PT Rick-leads diabetic emergency, 5 min. video, action guide	9
333-349	PT Hanna-stroke, 10 min. video, 7 minute discussion, action guide	16
350-409	PT George-heat and cold emergencies, 10 min. video, discussion, action guide	19
410-418	PT Larry-rescues, action guide	8
419-420	Test Review	1
421-445	Test and evaluation	24

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