This workshop was held at the 2017 Equal Justice Conference in Pittsburgh, Pennsylvania

Title:
Lessons Learned in Developing Universal Bite-Sized Online Pro Bono Training

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Effective training is a hallmark of successful pro bono programs. This session will offer a series of reflections and practical planning tools drawn from the collective experience and learning of the three partner organizations collaborating on the California Pro Bono Training Institute. Attendees of this interactive session will learn to incorporate adult learning styles, address common barriers, and solve problems to develop highly effective online training.
How to Create Your Pro Bono Training Institute Presentation

To incorporate modern adult learning best practices, all Pro Bono Training Institute (“Training Institute”) presentations state learning objectives and agendas, follow PowerPoint best practices, and implement interactive e-learning tools. To create a Training Institute presentation, please follow these steps:

Step 1. Set Learning Objectives: always have trainers develop the specific learning objectives of that training module. Here are the 4 factors of a well written learning objective:

- **Audience**: The audience will always be the trainees.
- **Action Verb**: The action verb is the most important element of an objective and can never be omitted. The action verb should describe what the trainee will be performing or doing for a pro bono purpose.
- **Condition**: The condition qualifies the trainee’s performance with any practical real-life circumstances to be applied in a pro bono purpose.
- **Standard (Optional)**: The standard to which the trainee’s performance should be set against.

Example Learning Objective: “After this learning experience, trainees (audience) will be able to apply these best practices of adult learning (action verb) within their respective organizations (condition) according to the University’s training standards (standard).”

Step 2. Write an Agenda - After completing writing your learning objectives, write your agenda. The agenda should reflect what areas of law or subtopics need to be discussed in order for the trainees to achieve the training module’s learning objectives. After writing your agenda, state your agenda after the learning objectives.
Step 3. Creating Your Presentation! PowerPoint Best Practices: to ensure that the PowerPoint effectively conveys the content of the presentation.

- **Use Size 26 font**: slides should be readable from the front row to the back row of an average sized classroom.
- **Use Fewer Words**: the fewer words used, the more people will listen and learn. State no more than five main points per slide and include no more than 10 words per point.
- **Use Photos or Images**: photos and images are effective visual cues for instruction. When possible, use 1-2 pictures per slide. *Caution*: too many pictures per slide, or using distracting pictures can decrease the effectiveness of your PowerPoint.
- **Use Moving Texts Sparingly**: animated or moving texts can detract from the content. Moving text should be used very sparingly if at all.
- **Slides should not take more than 2 minutes to explain**: As this will be a recorded training, trainees have expressed that they do not want to be viewing the same slide for a long period of time. Some pieces of information or slides may take over two minutes to explain. If this is the case, PBTI will work with you to ensure the viewer still remains engaged.

Step 4: E-Learning Interactions: Using our E-Learning software, trainees will respond to portions of your substantive lecture through interactive online quizzes and scenarios. We ideally like each training module to have at least 5-10 questions. Feel free to use the template in the PowerPoint to create the following:

- Question
- Potential Answers
- Explanation as to why each potential answer is correct or incorrect
Pro Bono Training Institute
Best Practices Manual

Guiding Principles for Delivering Engaging Trainings to Pro Bono Attorneys

Legal Aid Foundation of Los Angeles
OneJustice
Neighborhood Legal Services of Los Angeles County
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Pro Bono Training
Best Practices Manual
Guiding Principles for Delivering Engaging Trainings to Pro Bono Attorneys

1. Introduction

A. Who We Are: The Pro Bono Training Institute

The Pro Bono Training Institute (PBTI) is a new and innovative project started by the Legal Aid Foundation of Los Angeles (LAFLA), OneJustice, and Neighborhood Legal Services of Los Angeles County (NLSLA). PBTI’s mission is to create a more efficient training delivery system for legal aid networks in California through the development of a state-wide forum for “universal” substantive trainings. This forum will provide legal service organizations (LSOs) and pro bono attorneys with high quality, engaging, on-demand CLE trainings on a variety of legal topics affecting low-income individuals in California. PBTI’s vision is that its training delivery system will expand overall pro bono in the state by increasing access to trainings, reducing duplicative trainings, facilitating easier recruitment of private sector attorneys, and fostering connections between LSOs and private attorneys. PBTI will accomplish its mission and achieve its vision by drawing upon the success of highly-accessible video-based trainings, and recent innovations in adult learning techniques to produce online trainings on pro bono topics, which will be designed and delivered by a statewide network of legal aid nonprofits working collaboratively. This collaborative approach will ensure that PBTI trainings are the “universal” standard in California regardless of which county the trainee happens to be in.

B. Why Are Trainings So Important?

The goal of the pro bono relationship is to provide high quality legal assistance to the client. Trainings are an essential element of pro bono partnerships, as most pro bono attorneys will be asked to work in areas of the law and with particular types of clients that might be new and unfamiliar to them. Legal services organizations (“LSOs”) must, therefore, ensure that high quality training opportunities are made available to their pro bono partners.

In addition to ensuring pro bono attorneys are prepared to serve their pro bono clients, trainings are a good opportunity for LSOs to introduce their work, their role in the community, and the impact pro bono will have on the community at large. This helps strengthen relationships between nonprofits and law firms, often leading to increased participation in pro bono and potentially more general support for a nonprofit’s programs.

C. Pro Bono Community’s Need for Effective Trainings

In October 2014, the Pro Bono Directors of OneJustice, the LAFLA, and NLSAL held two regional meetings with California pro bono managers. The objective of these meetings was to develop a better understanding of
what makes pro bono trainings effective and efficient, and provide guidance to the development of PBTI. To achieve this objective, participants were asked the following three questions: (i) “What makes a ‘Great Training’ great?”; (ii) “Why do some trainings ‘Fall Flat’?”; and (iii) “How can we improve our pro bono trainings?” The results of the survey indicated the following needs for pro bono community: (i) training designs should be more meaningfully developed; and (ii) trainings should focus on building relevant knowledge and skill for the trainee’s for pro bono representation.

D. Best Practices

Best practices can be defined as a set of guidelines that represent the most productive course of action as directed by an appropriate authority. For nearly three decades, andragogy has served as the framework for training “adults” in the system that is adult education. Andragogy categorizes individuals as “adults” based upon a two part test. Applying this two part test to the intended audience of pro bono trainings – private attorneys, law students, or non-attorney volunteers – it is clear that this audience is composed of “adults”.

Best practices for pro bono trainings should incorporate the principles of andragogy, which are based upon four critical assumptions that differentiate andragogy from pedagogy (See Appendix A). Applying these four critical assumptions to pro bono trainings, PBTI has developed its best practices for pro bono trainings (see below).

2. Best Practices for Designing Effective Trainings

Using Adult Learning Scholarship to Make Trainings Effective and Efficient

A. Trainee Tailored Training

If the trainee is an adult, then the trainee comes with a valuable resource – experience. A trainer’s foresight into the trainee’s experience gives the trainer the ability to tap that resource or build a needed resource in order to achieve a specified learning objective. Therefore, if a trainer can tailor the training to trainee’s background, then the trainer can maximize her or his limited resources.

Trainee tailored trainings begins with asking the following two questions:

1. “Who are the trainees?” - Are they law students? Are they non-attorney advocates? Are they lawyers, and if so, what is their level of expertise? The answer to this question will provide the trainer with a yardstick to measure how much experience the trainer can build on.

2. “What is the purpose of the training?” - Is it to do intake, research or litigation or something else? The answer to this second question will guide the trainer’s determination as to what information is or is not relevant to the subject matter of the training. The purpose of the training should be developed around closing the gap between the skills required to implement the purpose of the training and the trainee’s current competency. Therefore, the trainers and training program administrators should evaluate the needs of the trainees prior to developing the training. Methods of evaluation are varied, but PBTI has used surveys and focus groups to determine the training needs of California.

2 Andragogy is the art and science of helping adults learn, in contrast to pedagogy, which is the art and science of teaching children. See Malcom Knowles, THE MODERN PRACTICE OF ADULT EDUCATION: FROM PEDAGOGY TO ANDRAGOGY 41-43 (Cambridge) (1980).

3 “Adult education brings together into a discrete social system all the individuals, institutions, and associations concerned with the education of adults, and perceive them as working toward the common goals of improving the methods and materials of adult learning, extending the opportunities for adults to learn, and advancing the general level of our culture.” Id. at 23.

4 (1) Whether the individual is performing social roles typically assigned by our culture to those considered to be adults; and (2) whether the individual perceives himself or herself to be essentially responsible for his or her own life. Id.
It is critical to note that these questions alone will not guarantee a training custom fit to the trainee’s needs. They are merely a starting point for the trainer to think about who the audience is and what necessary new skill the trainee is seeking to implement in a pro bono capacity.

B. Learning Objectives

Trainees should leave the training with a new skill that they did not possess prior to the training. Acquiring that new skill should be the “learning objective” of the training. After developing foresight into the trainee’s needs by “tailoring the training”, all trainers should develop learning objectives and make known to the trainees the specific learning objectives of that training.

I. What Are Learning Objectives?

A learning objective is a statement from the trainee’s point of view of the trainee’s learning outcome. Learning objectives describe what new skill the trainee will apply as a result of attending an education or training session that the trainee could not have applied before.5

Learning objectives are useful for these four major benefits they provide: (1) focus and consistency in the overall design of instruction; (2) guidelines for choosing course content and instructional strategies. (3) a basis for evaluating what trainees have learned; and (4) a basis for trainees to orient and organize themselves.6

II. Think About Learning Objectives

Learning objectives should be built around the discrete necessary tasks for which the trainee is seeking the training. The objectives should be clearly defined and measurable.7 The simplest way to start thinking about learning objectives is by answering three questions8:

1. **Intended Results** - What will trainees be able to do as a result of the training?
2. **Any Performance Conditions** - What are the conditions under which the trainee will perform the new skill for the pro bono client?
3. **Standards for Proficient Performance** - What level of proficiency will the trainee need to perform under the given conditions in order to serve the pro bono client?

III. Write Learning Objectives

Generally in most pro bono training settings, a well-written learning objective will incorporate the following four key factors9:

1. **Audience (Mandatory)** - The audience, which should be facially apparent from the learning objective, is always the trainees. Therefore, prior to writing learning objectives, trainers should know who they are training (see “Trainee Tailored Trainings” above).

2. **Action Verb (Mandatory)** - The action verb is the most important element of an objective and can never be omitted. The action verb should describe the action that the trainee will be performing or doing for a pro bono purpose, which forms the basis for the training.

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6 Id. at 18.
7 For example, poorly defined objectives for a public health law course would be "be aware of legal terms", or "have increased awareness of public health law" because these objectives do not indicate observable behavior, which makes assessment of their mastery impossible. On the other hand, well-defined objectives for the course would be "recognize legal issues and identify key public health laws that govern Health and Human Services' responsibilities, authority and limitations." Id. at 17.
8 See Id. at 7.
9 See Id. at 18.
3. **Condition (Optional)** - The condition qualifies trainee's performance with any practical real-life circumstances under which the trainee will perform the new skill for a pro bono purpose.

4. **Standard (Optional)** - The standard qualifies the trainee's performance

For example:

1. Learning Objective for Training Seminar- After this learning experience, trainees (audience) will be able to apply these best practices of adult learning (action verb) within their respective organizations (condition).

2. Learning Objective for a Civil Trial Advocacy Training Course - After completing this course, trainees (audience), in the context of a civil trail in a court room, using a fact pattern, client documents, pleading, transcripts statements of evidence and witness instructions (conditions), will be able to conduct a civil trial (action verb) in accordance with the criteria in the Civil Trial Advocacy Guide at a level of performance acceptable to the instructor acting as Judge (standard)

C. **Foster an Adult Training Environment**

Trainees require training environments which make them feel at ease and respected, in an atmosphere that is friendly and informal, in which there exists a spirit of comradery between the trainer and the trainee.\(^\text{10}\) In short, trainees should be made to feel like adults. Therefore, the training environment should meet the trainee’s physical and psychological needs.

1. **Physical Needs**: People tend to feel more “adult” in an environment that reflects their role in society. For highly educated adults, such as attorneys, the ideal physical environment would be a boardroom rather than a college classroom.\(^\text{11}\) This reduces the likelihood that the trainee feels that they are being talked down to and increases the likelihood that the trainee will be engaged in the training.

2. **Psychological Needs**: People tend to feel more “adult” when they are respected as unique individuals and valued for their contributions. The behavior of the trainer influences this more than any other single factor. The trainer should display an attitude of interest in and respect for students rather than viewing the trainees as receiving sets for transmissions of wisdom.\(^\text{12}\) Most importantly, the trainer should actively listen to what the trainees have to say.

D. **Lecture Guidance**

Within a single training session the trainer cannot transfer and the trainee cannot master the requisite the training subject matter. Although the trainee’s ability to recall information she or he merely heard or saw in lecture is extremely limited\(^\text{13}\), most pro bono trainings are still generally delivered solely by lecture. Thus, the likely gap in time between the training and the actual pro bono work undertaken makes it highly unlikely that the trainee will be able to recall information delivered by lecture when she or he actually performs pro bono work.

However, it is also highly likely that some lecturing is necessary for a pro bono training. Therefore, when lecturing trainers should follow these best practices:

1. **Lecture not in excess of 20 minutes**. Lectures longer than 20 minutes should be broken up into 20 minute blocks and complemented by interactive learning techniques, which apply the knowledge or skill discussed in the preceding lecture block.

2. **Use simple conversational language**.

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\(^\text{10}\) Knowles, supra note 2, at 46-47.

\(^\text{11}\) Furnishings and equipment should be adult sized and comfortable; meetings rooms should be arranged informally and should be decorated according to adult tastes; and acoustics and lighting should take into account declining audio visual acuity. See id.

\(^\text{12}\) Id.

\(^\text{13}\) See Appendix C.
3. **Present no more than 6 major points.**

4. **Present summaries of the lecture before and after the training.**

5. **Complement lecture with more interactive learning techniques**, which will provide for trainee participation.

6. **Use PowerPoint Appropriately.** PowerPoint is one of the most common platforms for trainings, and it is very important for trainers to know its shortcoming before creating a training:
   a. *PowerPoint is Not a Substitute for Training* – often trainers will hide behind their slides rather than learning the material so that they can incorporate more interactive learning.
   b. *PowerPoint is Inflexible* – Although PowerPoint is a good tool for presenting audio-visual information in a lecture format, all the downsides of lecturing are imputed into PowerPoint. Therefore, it is important to apply the lecturing best practices stated above.
   c. *Providing Slides Is Not a Substitute for Reference Materials* – merely providing PowerPoint slides used during lecture does not constitute providing reference material (see below “Reference Knowledge”).

Like lecturing, using PowerPoint may be the best to communicate with trainees. Similarly, trainers should follow **PowerPoint Best Practices**:

a. **Templates** – trainers should choose templates with pleasing colors and use of high-contrasting colors that draw the trainees’ eyes to important points.

b. **Font** – trainers should choose font sizes that should be readable to from the front row to the back row of the training room. Remember, unreadable information is information not worth communicating.

c. **Animation** – animation should be used sparingly and should never detract from the content.

d. **Limit Slide Content** – slides should not have all the information included because that is why the trainer is there, and that is what reference material and handouts are for.

e. **Use Visual Cues** – effective PowerPoint presentations merely provide aesthetic visual cues for the trainees that guide the training, which should be centered on trainer-trainee interaction.

### E. Interactive Methods

The more active the trainee’s role in the training, the more likely the trainee is being effectively taught new skills or information. **Lectures, assigned readings, and canned audio-visual presentations should, where reasonable, take a backseat to more interactive learning techniques.**

Examples of interactive learning techniques (from least to greatest level of interaction) include the following:

1. **Polling** – where the trainer solicits answers to questions from the trainees based on a census. This allows both the trainer and trainees to see how other trainees are viewing the problem or issue.

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14 See Northwest Center for Public Health Practice, **EFFECTIVE PRESENTATIONS: A TOOLKIT FOR ENGAGING AUDIENCES** 11-15 (University of Washington School of Public Health 2014) (2012).

15 See Knowles, *supra* note 2 at 41-55.
2. **Brain Storming** – where the trainer introduces a problem or issue facing the trainees and solicits answers from the trainees.

3. **Demonstration** – where the trainer describes a problem and walks the trainees through the steps of solving that problem.

4. **Case Study** – where a real life situation is presented to the trainees and the trainees, either in groups or as individuals, are asked to analyze the problem and offer a solution.

5. **Role Play** – where the trainer simulates a practical real life situation that the trainees would face in practice.\(^{16}\)

Ideally, the trainer should produce a realistic problem scenario that the trainee would encounter in practice; however, given limited resources, the appropriate interactive learning technique should be determined on a case-by-case basis.

### F. Reference Knowledge

Trainees do not need to memorize substantive laws during trainings if they have the necessary “reference knowledge”.\(^ {17}\) Reference knowledge is knowledge regarding how to use given resources to navigate a likely problem scenario in an activity that forms the basis of the training. Therefore, trainers should use their limited training time to do the following:

1. Thoughtfully compile reference materials and make them user friendly;
2. Provide reference materials and build trainees’ understanding of how to use them; and
3. If time permits, practice solving likely problem scenarios.

Given the importance of reference materials trainers should take the time to thoughtfully compile these materials and make them user friendly\(^ {18}\). PBTI has found that the provision of carefully compiled handouts and reference materials can be more beneficial to the trainees than the training itself because of the limited time of trainings and memory of trainees.

### G. Measuring Performance

Fundamental to trainee tailored trainings (see above) is evaluating the competencies of the trainer and the trainee. Trainees should be given the opportunity to evaluate the trainer and the program before and after the training. Similarly, the trainer should be given the opportunity to evaluate the trainees and the training program. With trainers and trainees evaluating each other and the training program, program administrators can gather the necessary data to evaluate whether the training program is having the desired impact.

Over time the training module itself should be evaluated based upon trainer-trainee performance. Therefore, it is necessary to gather data regarding each party’s performance.

Trainees should be evaluated based upon this three step process\(^ {19}\):

1. **Trainer Constructs Model Competencies** – The trainer should construct a model of the competencies required to achieve ideal performance so that the trainee has some vision of what is considered “good”
   a. *What is the ideal (standard) way that pro bono tasks should be performed?*

\(^{16}\) For example, a training module for DACA intake could have some trainees act as clients for the others to rehearse intake procedures.

\(^{17}\) In practice even the most experienced lawyers do not have all the answers, but they do have the tools and knowledge to find the solutions to problems that arise in practice.

\(^{18}\) User friendly means easy to use or understand based on the circumstances of the individual trainees.

\(^{19}\) See Knowles, supra note 2, at 47-48.
b. What does the pro bono client expect from the volunteer to be able to perform?

2. **Trainer Provides Diagnostic Experience**\(^{20}\) - The trainer should provide a diagnostic experience in which the trainee can assess their present level of competency. During a training, the diagnostic experience is generally performed through three phases:

   a. **Orient Trainees to the Training** - The trainer should have an opening session that fleshes out problems and concerns the trainees have on their minds as they enter.\(^{21}\) For example, the opening topic slide could be entitled - "What Are You Hoping to Get Out of X Course" - followed by a group discussion.

   b. **Perform Pre-Training Evaluation** - The trainers should perform a census or diagnostic exercise through which the participants would identify specific problems they want to be able to deal with more adequately.\(^{22}\) By building in a diagnostic procedure early, the adult trainee will be more able to look at themselves objectively and free their mind from preconceptions.

   c. **Trainee's Self-Diagnose Competency Gaps** - Trainee's should themselves measure the difference between their current level of competency and the model competency (the "competency gap").\(^{23}\)

3. **Offer Resources to Bridge Gaps** - Performing the roles of a resource bank and counselor, the trainer should offer resources and learning tools that can allow the trainee to close the competency gap.\(^{24}\)

3. **Delivering Effective Trainings**

   *Applying Best Practices to Deliver Engaging Pro Bono Trainings*

   **A. Avenues for Delivery**

   I. **Live** (In-Person/Virtual)

   Live trainings may be delivered in-person or virtually. Both provide trainees with the opportunity to interact with the trainer; however, webinar trainings have a limited portfolio of interactive learning techniques to rely on. On the other hand, while ideal for providing a richer interactive training experience, in-person trainings are less convenient and more costly compared to webinars.

   II. **Pre-Recorded** (E-Learning)

   Pre-recorded trainings provide flexibility for both Legal Service Organizations (LSOs) and participating volunteer trainees. Furthermore, they provide for repeat use in the future or to share with other LSOs, which reduces redundancies within the pro bono community. However, trainees have limited avenues of interaction when compared to the in-person trainings. In addition, it is critical that program administrators and trainers update pre-recorded trainings at least once a year in order to ensure accuracy.

   Given the best practices’ emphasis on promoting interactive learning techniques, e-learning delivery should incorporate quizzes, games or other online interactive tools. This is not only to promote learning but to also for gathering data on the training program’s efficacy.

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\(^{20}\) Id.

\(^{21}\) Cathy Solter, Pham Thi Minh Duc, and Susheela M. Engelbrecht, **ADVANCED TRAINING OF TRAINEES: TRAINER’S GUIDE** 13 (Pathfinder International) (2007).

\(^{22}\) Id.

\(^{23}\) See Knowles, *supra* note 2, at 47-48.

\(^{24}\) Id.
III. Hybrid

Hybrid trainings offer a mix of live and prerecorded learning experiences depending upon the circumstances of the training. For example, “virtual” trainees could undertake an e-learning course complemented by a webinar or in-person training where there are more interactive. Or, in the alternative, a live training could be complemented with e-learning tools that provide the trainee with further assistance and resources. This avenue of training delivery is recommended in order to mitigate the physical constraints of live trainings and maximize the convenience of pre-recorded.

B. Determining the Appropriate Avenue for Delivery

The “right” avenue for delivery of trainings is determined on a case-by-case basis depending upon the resources available and the realistic level of commitment of the trainer, trainees, and program administrators. However, for convenience, it is good practice to always record trainings for future development of e-learning modules. In doing so, program administrators can capitalize upon the effort undertaken to produce the in-person training.

C. Presentation Delivery

Although trainers may have varying presentation styles, the following are the core concepts – the "Anatomy of a Training" - of all effective trainers incorporate:

1. A Head - Trainers should be prepared “ahead” of time to deliver trainings that facilitate the delivery of resources for the trainee’s practical pro bono application.
   a. Trainer as Facilitator; Not Teacher: It is the core responsibility of every trainer to lead the training session for the purpose of facilitating trainee interactions that will further the learning objectives (see above). The trainer is to provide guidance through an interactive learning design to help trainees incorporate information into their personal frame of reference and apply it in practical ways. Trainers should be mindful of the differences between teaching and training.

2. Neck - Trainers should “stick their neck out” to engage all trainees, and encourage and validate their participation. While there is no set formula on creating this environment, these are some creative ideas for engaging participants:
   a. Use Non-Electronic Visuals:
      i. Tear Sheet Pads - tear sheet paper posted on wall can be used by trainees to communicate as groups to each other and the trainer.
      ii. Posters - posters immediately draw the attention of trainees as they enter the room.
   b. Interact Early and Often: The trainer should personally greet trainees upon arrival.


26 Some examples of personal greetings include: “Good morning. My name is ______ and I’ll be spending the next hour with you. That’s a great tie – where did you get it?”
   • “Hi, my name’s ______ and I’ll be your trainer today. I’m really happy to be here, and I’m glad you can join us for what should be a great learning experience.”
   • “Good morning, I’m ______ and I’ll be spending the next hour with you. What agency/organization/law firm are you from? Could you tell me a little about your work?”
c. Provide Refreshments: Drinks and morning/afternoon snacks are important to trainees as well as trainers. Coffee and donuts or bagels for morning trainings are generally sincerely appreciated by trainees.

d. Incentivize Participation with “Prize Boxes”: Incentivizing interaction among trainees can be advanced by having a box or bag decorated to catch trainees’ eyes, and filled with inexpensive prizes or gift cards.

3. Heart - Trainers should have a “heart” when presenting on sensitive topics and should use emotional stories to foster more pro bono volunteerism.

4. Hands - Trainers should have a “hands on” approach presentations that engage and involve the trainees through verbal interactions, physical activities, and provide plenty of opportunities for trainee feedback about the training topic. (See Interactive Methods above)

5. Guts - Trainers should have the “guts” to tackle emotional issues as well as trainees’ reactions to difficult topics.

6. Legs - Trainings should have “legs”; meaning that the information communicated during the training should be immediately applicable for the trainee’s pro bono activity.

4. Coordinating Training Logistics

In order to maximize training learning, trainers and program administrators must collaborate to coordinate the development, implementation, and evaluation of every training module. Training coordination should take place in the following three phases:

A. Pre-Training Coordination

Pre-training coordination lays the foundation and sets the tone for a successful training program. This phase begins after underlying objectives and educational goals for the training have been comprehensively established. The major tasks to be accomplished during this phase include the following:

1. Determine Training Dates – Beyond looking at availability of a proposed training site, program administrators should make sure training dates do not conflict with any holidays and religious observances.

2. Determine Training Site – Depending upon the learning objectives and goals, and the purpose and nature of the training program itself, program administrators should examine the advantages and disadvantages to each available training facility and site. When determining which facility and site is appropriate, a issues to think about include the following:

   a. Availability - Availability of participants on program dates must be determined;

   b. Costs - Costs should be determined with regard to:

      i. Training rooms;
      ii. Food; and
      iii. Audiovisual equipment.

   c. Location - The location must be

      i. Safe;
      ii. Barrier free access; and
      iii. Convenient.
d. Transportation/Convenience;

e. Accessibility - Facilities must be accessible for the Disabled;

f. Meeting Rooms - Meeting rooms must foster an adult learning environment (see above). Given the program's needs, meeting rooms should be selected based on the following factors:
   i. Size;
   ii. Appearance;
   iii. Lighting;
   iv. Décor; and
   v. Furnishing.

g. Cleanliness;

h. Supporting Services;

3. Develop and Manage Training Budget - Integral to the training process is the program administrator's responsibility to produce and maintain a budget that reflects the objectives and goals of the learning program and that it is well-planned and understood by all essential parties to the training.

4. Negotiate Contracts for Facilities and Amenities - Anything that will be provided by the training facility itself (e.g., hotel, university, etc.) must be included in a written contract.

5. Select Meeting Rooms - Based upon “Facilitating an Adult Learning Environment” (See above) and the following logistics:
   a. Lighting;
   b. Furnishing;
   c. Size;
   d. Access;
   e. Electrical Outlets and Computer Hookups; and
   f. Access to Other Areas - check for easy access to restrooms, bending machines, other meeting areas, and eating facilities.

6. Acquire Necessary Training Supplies - Determined by the needs of the trainer, whose needs are in turn based on the trainee's needs.

7. Arrange for CLE Credit - If a legal services provider can offer benefits to the firm as part of pro bono involvement - such as Minimum Continuing Legal Education (MCLE) credit for trainings - then the credit should be advertised and offered.

8. Advertise Trainings - Training program administrators should publicize all training modules on as many communication platforms as possible, including social media, at least 3 months in advance. Materials publicizing trainings should be clear and accurate descriptions of what the training will cover, the pro bono project, and any volunteer opportunities following the training. Information should provide a compelling description of client needs and importance of the project to encourage new recruits and strengthen the commitment of existing volunteers.

9. Identify Any Special Needs of Trainees - It is the responsibility of the program administrator to be aware of and accommodate any special needs of the trainees during the program.
10. **Communicate with Trainees** - The best way to start a training program is to be accessible and reliable for trainees prior to the program. Program administrators should begin contacting participants well in advance of the training in order to communicate any logistical information necessary for a successful training.

### B. Training Day Coordination

Although the quantity of training coordination takes place pre-training, adult learning scholarship has emphasized the growing importance of on-site coordination the day of the training. This is because it is important to do everything possible to ensure that the trainees enter a learning environment that fosters adult learning (see above). Major on-site coordination tasks include:

1. **Check Final Checklist** (See Appendix D);

2. **Final Clear Staff Assignments** - Staff assignments should be made regarding everything that needs to take place during the training program. Therefore, everything that needs to be handled by a staff member should be assigned beforehand to eliminate the possibility of confusion or disorganization.

3. **Have Trainee Materials Available** - All registration materials, including folders, schedules and nametags, should be neatly laid out and ready for participants to pick up at least one hour before the training begins.

4. **Help/ Resource Desk** - Trainings should have one or more resource tables with current, information, research, and publications pertinent to the trainees.

5. **Meet and Greet Trainees and Trainers** - Program staff should always greet trainees in order to break the ice, get to know trainees, and introduce them to each other.

6. **Attend To All On-Site Needs** - Program coordinators should be available on-site and accessible at all times during the training.

7. **Monitor Trainees’ Moods** - Program coordinators should monitor the learning environment and ensure that trainees a comfortable, active, and communicative.

8. **Thank All Participants** - As part of the closing, trainees should be acknowledged and thanked for their participation and commitment during the training process. Furthermore, where appropriate, trainees should receive special certificates, with their individual names, for successfully completing the training program, signed by the program and organizational sponsors. In addition, trainers receive similar commendation and certification for their work.

9. **Develop a Post-Training Plan** - Program coordinators should prepare and announce sign-up sheets for participants to fill out if they wish to be put on future mailing lists and/or request additional or ongoing resources.

### C. Post-Training Coordination

Just as important as pre-training coordination is post-training coordination, which improves the quality of future trainings and the training program itself. Post-training coordination generally consists of the following three activities:

1. **Wrap Up Training** - Program coordinators should ensure that all training materials and evaluations are collected; and make sure that equipment that remains on site is there in the same condition it was when the training began.

2. **Faculty Debriefing** - It is helpful and recommended to conduct a quick, on-site faculty debriefing to determine which training techniques and processes were effective, and which trainings need improvement.

3. **Prepare Evaluation Report** - based upon the trainee and trainer evaluations, and the faculty debrief, program coordinators should develop an evaluation report, which should reflect the evaluations’ findings.
4. **Follow-up Communication with Trainees** - all trainees should have received a list of faculty with appropriate contact information so that they can communicate with one another after the training has concluded. The coordinator should send a letter to all trainees and trainers thanking them again for their participation. Coordinators may enclose a memento from the training such as a certificate of completion.
### Appendix A. Andragogy vs. Pedagogy

<table>
<thead>
<tr>
<th>Assumption</th>
<th>Pedagogy</th>
<th>Andragogy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Concept of the Learner</td>
<td><strong>Learner is Dependent:</strong> Learner is entirely dependent upon the teacher to determine how, what, when and where of learning.</td>
<td><strong>Learner is Self-Directing.</strong> Learner desires self-direction to determine what is important enough to be learned.</td>
</tr>
<tr>
<td>2. Role of Learner’s Prior Experience</td>
<td><strong>Experience is Negligible.</strong> Learner has little experience from which to gain whereas the teacher has all experience from which the learner is to gain.</td>
<td><strong>Experience is a Rich Resource.</strong> Learner has experience that is a rich resource for knowledge and provides a pre-existing foundation.</td>
</tr>
<tr>
<td>3. Readiness to Learn</td>
<td><strong>Learner is Always Ready to Learn Regardless of Immediate Applicability.</strong> Societal pressures are great enough to incentivize the Learner to be ready to learn, with a uniform step-by-step progression.</td>
<td><strong>Learner is Only Ready to Learn Only If Learning is Immediately Applicable.</strong> The Learner is only ready to learn if he or she perceives the learning experience as immediacy satisfying a real-life task.</td>
</tr>
<tr>
<td>4. Orientation of Learning</td>
<td><strong>Subject Centric Organization.</strong> Curriculum should be organized into subject matter units which follow the logic of the subject.</td>
<td><strong>Performance Centric Organization.</strong> Curriculum should be organized around competency development categories.</td>
</tr>
</tbody>
</table>

---

## Appendix B. Teaching vs. Training

<table>
<thead>
<tr>
<th>Underlying Philosophy</th>
<th>Teaching</th>
<th>Training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Knowledge is passed from the teacher to the learner.</td>
<td>- Knowledge is discovered through mutual investigation of problems and issues.</td>
</tr>
<tr>
<td></td>
<td>- Organizations are improved through technical advances</td>
<td>- Organizations are improved through developed the</td>
</tr>
<tr>
<td></td>
<td>- Teacher-Oriented</td>
<td>- Learner-Oriented</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment of Needs for and Results of Education</th>
<th>Teaching</th>
<th>Training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Looks only at observable, measurable behavior.</td>
<td>- Looks at attitude as well as behavior.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Learning Objectives</th>
<th>Teaching</th>
<th>Training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Emphasize acquiring information</td>
<td>- Tailor degree of precision in objectives to the discrete task or skill to be performed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Learning Methods</th>
<th>Teaching</th>
<th>Training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Tend to be subject-oriented in the structure of the content - Minimally interactive in its instructional methods.</td>
<td>- Tend to orient the structure of the content to the trainee and the trainee's immediate needs. - Highly interactive instructional methods.</td>
</tr>
</tbody>
</table>

---

Appendix C. Dale's Cone of Experience

People generally remember:

- 10% of what they Read
- 20% of what they Hear
- 30% of what they See
- 50% of what they See and Hear
- 70% of what they Say and Write
- 90% of what they Do as they perform a task

Learners are able to (Learning Outcomes):

- Define
- Describe
- List
- Explain
- Demonstrate
- Apply
- Practice
- Analyze
- Design
- Create
- Evaluate

Direct Purposeful Experience -- Go through the real experience

### Appendix D – Final Checklist for Trainee-Centric Programs

<table>
<thead>
<tr>
<th>Items to be Checked</th>
<th>Points to be Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities (meeting rooms for training sessions, meal areas, break areas, and breakout rooms [if any])</td>
<td>- All facilities are accessible to persons with disabilities.&lt;br&gt;- Lighting is adequate.&lt;br&gt;- Ventilation is good.&lt;br&gt;- Temperature is comfortable.&lt;br&gt;- Layout of room fosters an adult learning environment (See “Best Practices” p. 5).</td>
</tr>
<tr>
<td>Meals and breaks</td>
<td>- Exact times for any meals and breaks are established.&lt;br&gt;- Quantity of any food meets final count of attendees.&lt;br&gt;- If food is provided, then menu results what was requested, and vegetarian and options for religious observance are available for every meal.</td>
</tr>
<tr>
<td>Trainers and Program Staff</td>
<td>- All staff have a clear understanding of their roles and tasks.&lt;br&gt;- All presenters, facilitators, and trainers are accounted for.</td>
</tr>
<tr>
<td>Equipment</td>
<td>- The correct equipment is placed in the correct room.&lt;br&gt;- Internet connectivity is available in presentation rooms.&lt;br&gt;- All equipment is working properly&lt;br&gt;- Backup equipment is available and easily accessible.</td>
</tr>
<tr>
<td>Materials and Resources</td>
<td>- All items are complete and ready.&lt;br&gt;- The number of copies allows for ten more copies than the number of participants.&lt;br&gt;- The materials are arranged in order of use, or by day.</td>
</tr>
<tr>
<td>Program Schedule/Agordea</td>
<td>- People have been assigned responsibilities for keeping the activities on time.&lt;br&gt;- Methods for keeping on schedule have been agreed upon.</td>
</tr>
<tr>
<td>On-Site Registration</td>
<td>- Procedures are clear and participant friendly.&lt;br&gt;- Available registration times are posted and have been communicated to participants.&lt;br&gt;- Nametags and other registration materials are ready and arranged alphabetically.&lt;br&gt;- Staff/trainers are available one hour prior to registration.</td>
</tr>
</tbody>
</table>

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30 Christine Edmunds, Kip Lowe, Morna Murray, Anne Seymour, supra note. 2 at Ch. 2, p. 20.
Session Plan: Lessons Learned in Developing Universal Online Pro Bono Trainings
Equal Justice Conference – Pittsburgh, PA
May 2017, 3:45-5:15 pm

Facilitator: Jessica Therkelsen, Phong Wong, Sharon Bashan (Jeanne Nishimoto)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Responsible</th>
<th>Method</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give Quick Welcome &amp; Do Brainstorming</td>
<td>Jessica</td>
<td>Brainstorming—</td>
<td>10 mins</td>
</tr>
<tr>
<td>- “Welcome to our session on lessons learned from developing universal, bite-sized, online trainings. Before introductions, we’re going to start with some brainstorming.”</td>
<td>Sharon</td>
<td>Elicit Popcorn Responses</td>
<td>3:45-3:55</td>
</tr>
<tr>
<td>First:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- “Collaborative Trainings. Think about a collaborative training/project that you worked on recently. What made it great and what made it not so great?” What resources helped make it great?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Collect ideas from group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Panelist Introduce Themselves</td>
<td>Everyone + Jeanne</td>
<td>Lecture</td>
<td>2 mins</td>
</tr>
<tr>
<td>· Each panelist says their name, position, and organization.</td>
<td></td>
<td></td>
<td>End 3:57</td>
</tr>
<tr>
<td>Provide Learning Objective &amp; Agenda</td>
<td>Jessica</td>
<td>Lecture</td>
<td>2 mins</td>
</tr>
<tr>
<td>· Take-Aways and Concerns</td>
<td></td>
<td></td>
<td>End 3:59</td>
</tr>
<tr>
<td>Give Background on Training Institute</td>
<td>Phong</td>
<td>Lecture</td>
<td>4 mins</td>
</tr>
<tr>
<td>- Mission</td>
<td></td>
<td></td>
<td>End 4:03</td>
</tr>
<tr>
<td>· Collaboration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>· Best Practices</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>· Single Platform</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report back on lessons learned on PBTI collaborative project after 2 years:</td>
<td>Sharon</td>
<td>Lecture</td>
<td>10 mins</td>
</tr>
<tr>
<td>1. Collaborating with other advocates to develop trainings takes more time</td>
<td></td>
<td></td>
<td>End 4:13</td>
</tr>
<tr>
<td>2. Designing trainings and implementing best practices takes staff time</td>
<td>Jeanne to help explain</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Technology is expensive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Data collection requires thought and time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Beware of mission creep!</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Case Study - as individuals
“You will now be asked to review a training outline to see if it makes sense.”
You all were given a handout that has the proposed outline of a collaborative training project. Based on what you just learned, what changes would you make to this training outline?”

<table>
<thead>
<tr>
<th>Jessica</th>
<th>Sharon and Jeanne hand out outline</th>
<th>Interactive Case Study</th>
<th>10 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>End 4:23</td>
<td></td>
</tr>
</tbody>
</table>

Ask Groups to Report Back
- “Okay, STOP! Time’s up!”
- “Can I have volunteers raise their hands to report their suggested changes.”

<table>
<thead>
<tr>
<th>Jessica</th>
<th>Sharon take notes</th>
<th>Jeanne help explain</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 10 minutes | End 4:33 |

Now, lets talk about the other things we learned from PBTI. Training Best Practices
1. Tailor training to audience
2. Set an Objective
3. Lecture Less!
4. Promote Interaction
5. Build Reference Knowledge

<table>
<thead>
<tr>
<th>Phong</th>
<th>Lecture</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 7 mins | End 4:40 |

Start Small Group Projects
- “We’re now going to breakout into groups and see if we can implement some training best practices into an in-person training”
- Please get into groups of up to 10 people
- Each group has been assigned the powerpoint training, but each with a different audience and purpose in mind.
- You have 10 minutes to identify the change. Be as creative as you want.

<table>
<thead>
<tr>
<th>Phong leads</th>
<th>Interactive Small Groups -</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 15 mins | End 4:55 |

Ask Groups to Report Back
- “Okay, STOP! Time’s up!”
- “Each team should now have 1 minute to report their results.”

<table>
<thead>
<tr>
<th>Sharon</th>
<th>Small Groups (Will have own flipcharts)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 10 mins | End 5:05 |

Ask for Take-Aways
- Take-Aways are things people are going to take back home with them

<table>
<thead>
<tr>
<th>Jessica</th>
<th>Brainstorming</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 10 mins | End 5:15 |

Top 5 Lessons from PBTI’s First Two Years

**Lesson #1:** Collaborating with advocates to develop trainings takes time. There are additional administrative burdens that come with collaboration. For instance, scheduling meetings can be a challenge. It may take a few weeks (and a few attempts) to find a time when everyone is available. There are also more people that require follow up and more layers of review for any training. It also takes more time to make decisions, since they are done through consensus.

For instance, this is what it might take to decide on the content for a training:

<table>
<thead>
<tr>
<th>As an individual</th>
<th>In a collaboration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1: Think.</td>
<td>Step 1: Email collaborators to get their availability for a meeting.</td>
</tr>
<tr>
<td>Step 2: Decide on content.</td>
<td>Step 2: Send 2nd email reminding collaborators to provide availability.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Set a time for a conference call to discuss the training content.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Convene conference call among all collaborators to discuss and determine content.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Circulate notes from call and solicit feedback.</td>
</tr>
<tr>
<td></td>
<td>Step 6: Incorporate feedback from the group. Repeat until there is consensus.</td>
</tr>
</tbody>
</table>

Though it takes more time, we firmly believe that the collaborative method is one of the most important features of our project. It leads to higher quality trainings, a more streamlined experience for pro bono volunteers, and saves time in the long run because with organizational buy in, advocates are free to do other work and spend less time presenting trainings. Outside the project, it also strengthens partnerships among the organizations.

**PRO BONO TRAINING INSTITUTE**
Lesson #2: Designing trainings and implementing best practices takes time. Designing an effective training is a skill (and it's a different skill than effective advocacy)! Some trainers may be more willing (or more able) to absorb this skill than others. Some trainings may require 4-5 rounds of edits between staff and trainers to get everyone to feel comfortable about a training.

Some aspects of a traditional training may not translate immediately for online viewing. Two common issues are 1) walking a learner through a legal form that would normally be provided as a handout in a live training, and 2) limiting the amount of time a speaker spends on a single training slide. We have a policy of limiting slides to 2 minutes, based on feedback we received from users.

Sample on next page.
**THE ORIGINAL TRAINING:** This original slide was intended for an in-person training. It covered the basics of the two concepts and the trainer followed up by reviewing the Paramedical Services Form, which was provided to each trainee.

**AFTER THE TRAINING WAS ADAPTED FOR PBTI:**

**Transportation Services**

- Transportation to health-related appointments
- IHSS may pay for wait time at doctor’s appointments

**Practice Tip:** Be sure consumer has list of all appointments and tells IHSS how long it takes to get there

**Paramedical Services**

- i.e. injections, blood sugar testing
- Doctor must complete Paramedical Services Form

For PBTI, we split the original slide into two in order to stick to our 2 minute rule.

Because it was important to review the form in the training, an additional slide with an annotated form was added to the training.
Lesson #3: Technology can be expensive.
For our project, we wanted a standalone website where we could track our user’s progress and provide interactive features. As the project’s popularity grows, the costs of maintaining the website also grow to ensure that the website can function well.

Sample Technology Budget for a Program Similar to PBTI

<table>
<thead>
<tr>
<th>Recurring costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain: $40/year</td>
</tr>
<tr>
<td>Hosting: $2400/year</td>
</tr>
<tr>
<td>Learning Management Software: $6000/year</td>
</tr>
<tr>
<td>Content Delivery Network: $1200/year</td>
</tr>
<tr>
<td>Adobe Presenter or Captivate $360/year</td>
</tr>
<tr>
<td>Additional costs</td>
</tr>
<tr>
<td>Contractors: $10,000</td>
</tr>
</tbody>
</table>

**Total projected cost for 2 years: $20,000**

It is possible to create a basic low-cost training program by sacrificing certain features. For instance, training videos can be hosted on an organization’s main web page and posted to Vimeo.

Sample Technology Budget a Low-Cost Training Website

<table>
<thead>
<tr>
<th>Recurring costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain: Free (absorbed in costs existing website)</td>
</tr>
<tr>
<td>Hosting: Free (absorbed in costs for existing website)</td>
</tr>
<tr>
<td>Vimeo Plus Account: $60.00/year</td>
</tr>
<tr>
<td>Adobe Presenter or Captivate $360/year</td>
</tr>
</tbody>
</table>

**Total projected cost for 2 years: $840**
Lesson #4: Data collection requires significant thought and time. Data is a powerful tool for measuring the success of a program, but it can be challenging to gather reliable data. At PBTI, we are collecting this information in the following way:

**Surveys:** One survey is sent out every week to new registrants generally answers our general broad questions we have as to how the training modules are being used. Only those who want to respond will, and therefore the information could be biased.

**Snap Poll:** Trainees are asked to rate each training module (on a scale of 1 to 5) at the end of each training. This will gather general attitudes on that particular training module. Information is very limited, since it only measures the trainees experience with a specific training.

**One-on-one interviews:** This is a great way to gather how organizations feel about PBTI and how they are systematically using our training modules. This provides the most in-depth information, but it takes time to set up and compile the answers to the responses.

**Focus groups:** We are beginning to convene focus groups to do a language access needs assessment of the community.

Investing in data collection requires substantial resources, but having the necessary data to show the project’s value is a powerful tool for future support.

Lesson #5: Beware of mission creep! Successful collaboration means our partners have come to us with new projects and ideas for the website. Not everything fits within PBTI’s mission, even some of the proposals that we think are incredibly valuable for the legal community as a whole. Our desire to be responsive to the community needs to be balanced with maintaining a clear mission for our project.