

**Bosnia and Herzegovina
Federation of Bosnia and Herzegovina
Federal Ministry of Finance
Customs Training Commission**

INSTRUCTIONAL TECHNIQUES COURSE

**Participant Manual
1997**

The Federal Minister of Finance, Mr Drago Bilandžija accepted the Training Commission's Report and Training plan on December 30, 1996.

The Training Program has been developed by the Federal Ministry of Finance, the Federation Customs Administration, the European Commission Customs and Fiscal Assistance Office (CAFAO) and the US Agency for International Development (USAID).

WORKSHOP INTRODUCTION

1. INTENT OF WORKSHOP

This workshop, **Instructional Techniques for Classroom Instructor/Facilitators**, is an important step in preparing instructors/ facilitators to be able to conduct training sessions. These instructors/facilitators are identified by the management to facilitate training sessions as required.

The intent of the workshop is to prepare local instructors / facilitators to implement the training of a specific target population using the training materials designed and developed for their specific course/workshop.

Attending this workshop provides the local instructors/ facilitators with the opportunity to apply their subject matter expertise of their assigned workshop/course and the skills required in order to successfully facilitate the sessions assigned to them.

By working with the materials of the workshop/course, they will experience both the preparation and facilitation activities required of them on the job. This will result in more efficient use of time and more effective training sessions.

2. TRAINING OBJECTIVE

At the end of this workshop, participants will be able to

PERFORMANCE: facilitate assigned workshop(s)/course(s)

CONDITIONS: given the training package for the workshop(s)/courses(s), the Participant Manual for the Instructional Techniques for Classroom Instructors/ Facilitators Workshop, the Instructional Techniques Reference Material and the required equipment

alone

with assistance

STANDARD: according to the guidelines presented during the workshop and meeting the criteria statements in the Observation Checklist

3. EVALUATION OF OBJECTIVE

Throughout the workshop, participants will be given the opportunity to practise using the techniques essential to successful facilitation of their identified course by working with the materials from the training package. They will have the opportunity to assess their own progress in their acquisition of instructional techniques.

The final performance check of the workshop will ask participants to select and present one of the segments of the workshop which the participant is expected to facilitate in the immediate future. This activity will serve as the means to evaluate the achievement of the workshop objective.

4. CONTENT OUTLINE

Workshop Introduction

1. Confirming Content Expertise
2. Using the Training Package
3. Introducing the Course/ Lessons/ Modules
4. Facilitating Learning Activities
5. Managing the Learning Environment

Performance Check

Workshop Conclusion

5. TIMETABLE FOR 10-12 PARTICIPANTS

TIME	DAY ONE	DAY TWO	DAY THREE	DAY FOUR	DAY FIVE
AM	Workshop Introduction 50 m	Continued	Continued Implementing Exercises (90m)	optional day to allow for more selected topics	Performance Check Preparation
break	20 m				
	Confirming Content Expertise 60 - 120 m Using a Training Package 150 m	Continued Facilitating Learning Activities Lesson Intro (10m) Instructional Methods (30m) Visuals (90 m)	Continued Selected Topics (90-210m)		Presentation
lunch	60 m				
PM	Continued	Continued Giving Explanations (90 m)	Continued		
break	20 m				
	Introducing a Training Session 215 m	Continued Using Questions (90 m)	Continued Managing the Learning Environment (90m)		Workshop Conclusion (65 m)

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EXERCISE: EXPECTATIONS

PURPOSE: To identify what you want to gain from the workshop

TIME: 5 minutes individual and then
10 minutes in small groups

INSTRUCTIONS:

1. Individually, list what you want to gain from this workshop.
2. In small groups discuss your workshop expectations and record them on flipchart. Appoint a spokesperson for your group.
3. Report your results to the whole class.

Individual List

Group List

LESSON 1: CONFIRMING CONTENT EXPERTISE

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EXERCISE: IDENTIFYING QUESTIONS ON CONTENT

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LESSON 1: CONFIRMING CONTENT EXPERTISE

LESSON OBJECTIVE

At the end of this lesson participants will be able to

Performance: answer their own questions relating to the subject matter of the training materials

Conditions: given a training package
individually
with assistance

Standard: according to guidelines provided during the lesson

EVALUATION OF OBJECTIVE

Participants will be asked to answer the questions they identified about the subject matter of the training package.

LESSON OUTLINE

NOTE TO PARTICIPANTS: This segment of training focuses on the content of the particular course(s)/ workshop(s) you are to deliver. To assist you in becoming confident with the content of your assigned course, your facilitator will have chosen **ONE** of the following options:

1. Deliver the specific course/workshop in its entirety to the participants as if they were members of the target population so that they experience the workshop as intended by the design. This experience would serve as an opportunity for them to acquire the necessary subject matter expertise.

If this option is chosen, participants are to clarify their concerns about the subject matter before proceeding with Lesson Two, Using the Training Package.

2. Present content training to participants using an approach other than the training package. This could involve presentation from a subject matter expert, video films, or reading and discussion. This might be the best option where facilitators require more depth than the training materials provide. (e.g., nutrition as it relates to stress management)

EXERCISE: IDENTIFYING QUESTIONS

ON CONTENT

PURPOSE: To list the questions/concerns you have so that they can be addressed during this segment

TIME: 15 minutes preparation

INSTRUCTIONS:

1. Consider each of the topics presented in your training package. Based on your experience on the job and with the content during its presentation to you, record any questions related to the content that still remain unanswered for you. (in making your list, limit your questions to issues related to the subject matter; avoid those dealing with the method of instruction)
2. In plenary session, present your questions as directed by the workshop facilitator. Record from the discussion those points which contain the answers you seek.

PERFORMANCE CHECK: ANSWERING QUESTIONS ON CONTENT

PURPOSE: To confirm you have answers to the list of questions/concerns you prepared

TIME: 10 minutes

INSTRUCTIONS:

1. Refer to the list of questions you prepared in the previous exercise.
2. Determine, for each of your questions, how you would answer them if they were posed to you.

LESSON 2: USING A TRAINING PACKAGE

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EXERCISE: FACTORS CONTRIBUTING TO LEARNING	
EXERCISE: LEARNING AND THE TRAINING PACKAGE	
EXERCISE: EXPLORING A LESSON PLAN	
PERFORMANCE CHECK	2.6

LESSON 2: USING A TRAINING PACKAGE

LESSON OBJECTIVE

At the end of this lesson participants will be able to

Performance: describe how the training package addresses the learning expected of the workshop participants

Conditions: given a training package,
alone
with assistance

Standard: according to the guidelines presented during the workshop

EVALUATION OF OBJECTIVE

Participants will answer questions on the various aspects of their training package. These questions will require them to demonstrate knowledge of the learning process and to relate it to their use of the training materials.

LESSON OUTLINE

1. Role of Instructor/Facilitator
2. The Learning Process
3. The Training Package

EXERCISE: THE ROLE OF A INSTRUCTOR/FACILITATOR

PURPOSE: To identify the characteristics of an ideal instructor/facilitator.

TIME: 3 minutes individually
7 minutes in small groups

INSTRUCTIONS:

1. Think of a particularly effective teacher/instructor/facilitator you have had in the past. List below those characteristics you believe contributed to their effectiveness. If you can't think of a specific person, list those characteristics you believe an ideal instructor/facilitator would have.
2. In your small group, discuss your answers and come up with a group list of the **five** most important characteristics. Appoint a spokesperson for your group.

Individual List	Group List

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EXERCISE: FACTORS CONTRIBUTING TO LEARNING

PURPOSE: To identify the factors contributing to successful learning experiences

TIME: 15 minutes

INSTRUCTIONS:

1. Think about your own preferences for learning situations. Rate your agreement with the ten statements below, using a 5-point scale with 1=no agreement and 5=strong agreement.

STATEMENTS	RATING
1. I prefer reading to listening.	1 2 3 4 5
2. I want to apply what I am learning.	1 2 3 4 5
3. I enjoy working on my own.	1 2 3 4 5
4. I like to discuss new ideas with others.	1 2 3 4 5
5. I work best following a plan.	1 2 3 4 5
6. I work best under pressure.	1 2 3 4 5
7. I adapt easily to changing situations.	1 2 3 4 5
8. I have difficulty remembering details.	1 2 3 4 5
9. I respond intuitively to situations.	1 2 3 4 5
10. I prefer thinking to acting.	1 2 3 4 5

2. Compare and discuss your answers with another participant.

3. Working with the other participant, **answer the question, What factors contribute to successful learning?.**

Use your own experience as learners to prepare your list of the ideal learning conditions.

4. Be prepared to share your list in plenary session.

EXERCISE: LEARNING AND THE TRAINING PACKAGE

PURPOSE: To focus on the learning required of participants

TIME: 15 minutes

INSTRUCTIONS:

1. In small groups, discuss the answers to the following questions about the course/workshop you are preparing to facilitate.
 1. What is the objective identified for your training package?
 2. Do you think this objective is appropriate for your future participants?
 3. In your opinion, what are some of the ways that the training package could provide learning opportunities for the participants?
 4. What do think the instructor/facilitator could do to stimulate the learners and clarify the content?
2. Report your answers in plenary session.

PERFORMANCE CHECK: RELATING THE TRAINING PACKAGE TO LEARNING

PURPOSE: To highlight the relationship between learning and the training package

TIME: 10 minutes preparation
10 plenary take up

INSTRUCTIONS:

Describe how your assigned lesson addresses the learning expected of your participants by answering these questions.

1. What provides learners with the context necessary for learning? (i.e., why will the learners be able to relate to what they are learning?)
2. What makes the material to be learned digestible for the learners?
3. What opportunities are provided for learners to practise using their new knowledge and skills?
4. What guidance is provided to the instructor/facilitator to ensure clarity and to stimulate thinking?
5. Why do you think the training session will result in the achievement of the objective?

LESSON 3: INTRODUCING THE SESSION

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EXERCISE: COMPONENTS OF AN OBJECTIVE	
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PERFORMANCE CHECK	3.8

LESSON 3: INTRODUCING THE SESSION

LESSON OBJECTIVE

At the end of this lesson participants will be able to

Performance: deliver a course/lesson introduction

Conditions: given a training package
individually
with assistance

Standard: according to guidelines provided during the lesson

EVALUATION OF OBJECTIVE

Participants will be asked to present an introduction to either a course or a lesson based on their assigned training package.

LESSON OUTLINE

1. Purpose of an Introduction
2. Components of an Introduction

EXERCISE: COMPONENTS OF AN INTRODUCTION

PURPOSE: To identify the components of an introduction and to suggest how they affect the learning process.

TIME: 05 minutes individually
05 minutes with another participant

INSTRUCTIONS: Examine the sample of an introduction from your training materials to answer the following questions. Discuss your findings with another participant. Be prepared to share your results.

1. How many parts or components can you identify in this introduction?
2. Describe what each component covers.
3. How does each component affect the learning process?

EXERCISE: OBSERVABLE PERFORMANCE IDENTIFICATION

PURPOSE: To identify in performance statements the verb that describes an observable and measurable action

TIME: 5 minutes

INSTRUCTIONS: The following is a list of potential performance statements for lesson objectives. Consider each in terms of being measurable and observable. **Underline** the words in the statements that describe an **observable** and **measurable** performance.

At the end of the lesson the participants will be able to:

1. list the factors contributing to tax avoidance;
2. appreciate the rules of staff selections;
3. reply to taxpayer inquiries over the public information counter;
4. develop an appreciation for income tax collection techniques;
5. verbally describe the procedure for processing in-coming mail;
6. prepare a spreadsheet

EXERCISE: COMPONENTS OF AN OBJECTIVE

PURPOSE: To identify the components of an objective.

TIME: 5 minutes

INSTRUCTIONS: Identify in the lesson plan of the lesson or portion of lesson you will be delivering, the components of an objective. Respond to the following questions and be prepared to share your results in plenary.

1. What is the action verb used in the performance statement?
2. What are the conditions under which this performance will be achieved?
3. How will it be determined that an acceptable level of performance as been attained?
4. Is the lesson enabling objective coherent with the course training objective?

INTRODUCTION OBSERVATION CHECKLIST

	ITEMS	YES/NO	COMMENTS
1.	Provided a context for the lesson (link to work/life, previous and/or future lesson).		
2.	Presented the objective: <ul style="list-style-type: none">- Orally and in writing- How objective will be measured.		
3.	Gave an outline (overview of lesson content and sequence of events).		
4.	Captured interest (motivation).		
5.	Managed time effectively		
6.	Varied pitch and volume of voice.		
7.	Pace of speech and pauses were appropriate		
8.	Movement and gestures were natural.		
9.	Maintained eye contact.		
10.	Visual support was used.		

EXERCISE: PREPARING AN INTRODUCTION

PURPOSE: To prepare an introduction for presentation

TIME: 20 minutes for preparation.

INSTRUCTIONS:

1. Using your training material, prepare the introduction of one of the lessons. (You will be delivering this introduction in the performance check of this lesson).
2. Refer to the **Introduction Observation Checklist** on the previous page to see that your preparation is complete.
3. Refer to the reference material, **Introducing the Session** and **Overcoming Presentation Anxiety** to help you prepare for the next activity involving your presentation of the introduction.

PERFORMANCE CHECK: DELIVERING AN INTRODUCTION

PURPOSE: To present an introduction with the use of video for feedback.

TIME: 05 minutes per participant to deliver the introduction.
10 minutes per participant to provide feedback.

INSTRUCTIONS:

1. Review the introduction you have prepared.
2. Follow the process for presentation described below:
 - presentation and taping of introduction;
 - presenter and other participants write feedback using the checklist as reference;
 - presenter gives own view;
 - feedback from the group;
 - review of portion of the tape; and
 - the group passes written feedback to presenter.

Presentation of feedback

It is important to provide feedback in a constructive way. Positive points, i.e., things that went well, should be highlighted and areas requiring modification or improvement should be presented as suggestions.

Presenters will be careful to think positively when doing a self-critique. Respond to the two following questions, in this order:

- what have I done well?
- what would I do differently?

LESSON 4: FACILITATING LEARNING ACTIVITIES

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CORE EXERCISES

EXERCISE: LEVEL OF LEARNER INVOLVEMENT

EXERCISE: IDENTIFYING INSTRUCTIONAL METHODS

EXERCISE: ABOUT RETENTION

EXERCISE: USING VISUAL SUPPORT (OPTION #1)

EXERCISE: USING VISUAL SUPPORT (OPTION #2)

EXERCISE: GIVING AN EXPLANATION/LECTURE

CHECKLIST FOR EXPLANATIONS

EXERCISE: ACKNOWLEDGING PARTICIPANTS' ANSWERS

EXERCISE: PREPARING QUESTIONS

EXERCISE: EXAMINING EXERCISES

EXERCISE: IMPLEMENTING EXERCISES

OPTIONAL EXERCISES

EXERCISE: FACILITATION OF GROUP DISCUSSION ACTIVITY

EXERCISE: GIVING DEMONSTRATIONS/WALKTHROUGHS

EXERCISE: IMPLEMENTING ROLEPLAY ACTIVITIES

EXERCISE: COACHING PARTICIPANTS IN TRAINING

EXERCISE: USING VIDEO MATERIALS IN TRAINING

EXERCISE: IMPLEMENTING CASE STUDY/SIMULATION ACTIVITY

EXERCISE: CONCLUDING TRAINING SESSIONS

EXERCISE: CO-INSTRUCTION

PERFORMANCE CHECK 4.24

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LESSON 4: FACILITATING LEARNING ACTIVITIES

LESSON OBJECTIVE

At the end of this lesson participants will be able to

Performance: facilitate learning activities as identified in training materials

Conditions: given a training package
individually
with assistance

Standard: according to guidelines provided during the lesson

EVALUATION OF OBJECTIVE

Participants will be asked to prepare and facilitate learning activities representative of those identified in their assigned training package.

The cumulative performance of the participants in each of these activities throughout the lesson will serve as the measure of the achievement of the lesson objective.

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LESSON OUTLINE

- **CORE CONTENT**

1. Instructional Methods
2. Using Visual Support
3. Giving an Explanation
4. Effective Questioning
5. Implementing Exercises

- **OPTIONAL CONTENT**

6. Experiential Learning as an Approach to Instruction
7. The Group Discussion Instructional Methods
8. Giving Demonstrations/Walkthroughs
9. Implementing Roleplay Activities
10. Coaching in the Classroom
11. Implementing Case Study/ Simulation Activities
12. Using Video Materials
13. Concluding Sessions
14. Co Instruction

EXERCISE: LEVEL OF LEARNER INVOLVEMENT

PURPOSE: To assess the level of learner involvement in the methods commonly used in Revenue Canada training materials

TIME: 10 minutes

INSTRUCTIONS: Consider each of the methods listed below from the point of view of what the learner is doing.

For each method

- . note the learner action
- . rate the learner involvement using a rating of high, medium or low.

METHOD	LEARNER ACTION	LEARNER INVOLVEMENT RATING
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1. lecture

2. demonstration
/walkthrough

3. question and answer

4. discussion

5. brainstorming

6. practical exercises

7. problem solving
/ discovery

8. role play

9. case study/ simulation

EXERCISE: IDENTIFYING INSTRUCTIONAL METHODS

PURPOSE: To discover the instructional methods incorporated in design

TIME: 10 minutes

INSTRUCTIONS: Examine a lesson plan from your materials noting the suggested instructional methods.

Record your observations by answering the questions below.

1. What methods are part of the design?

2. What portion of the available time is designated as
 - lecture?
 - question and answer?
 - exercises?
 - other?

3. What training aids are identified as visual support?

4. How are questions and expected responses provided?

5. What assumptions are made about the knowledge/skill level of the participants?

6. How would you assess the level of learner involvement?

EXERCISE: ABOUT RETENTION

PURPOSE: To compare your personal estimate of the effect that visual support has on retention to an actual study result

TIME: 2 minutes individually: 8 minutes in plenary

INSTRUCTIONS: Complete the **first** table with your personal estimates. Then in plenary session, compare your estimates with the actual results as provided by the instructor. Record those in the **second** table.

1.

ABOUT RETENTION

PRESENTATION	3 HOURS RECALL	3 DAYS RECALL
TELLING ONLY	%	%
SHOWING ONLY	%	%
BLEND OF BOTH	%	%

2.

ABOUT RETENTION

PRESENTATION	3 HOURS RECALL	3 DAYS RECALL
TELLING ONLY	%	%
SHOWING ONLY	%	%
BLEND OF BOTH	%	%

EXERCISE: USING VISUAL SUPPORT (OPTION #1)

PURPOSE: To practise presenting information to others using the content related to the use of visual support.

TIME: 15 minutes preparation
5 minutes presentation

INSTRUCTIONS:

1. Refer to the **Instructional Techniques Reference Material** to review the resource materials, **Using Visual Support**.
2. Determine in plenary the segments for presentation.
3. Work individually/ in small groups to prepare the presentation of your segment, using demonstration as your method of presentation.
4. Present the segments in sequence to the class.
5. Discuss any issues related to the content that require clarification.

EXERCISE: USING VISUAL SUPPORT (OPTION #2)

PURPOSE: To prepare a training aid to be used as visual support

TIME: 15 minutes preparation; 10 minutes critique

INSTRUCTIONS:

1. Identify in your lesson materials an appropriate opportunity for the use of a flipchart, chalk/white board or an overhead transparency.
2. Refer to the **Instructional Techniques Reference Material, Using Visual Support.**
3. Design the training aid, following the planning steps and applying the relevant design criteria.
3. Present your training aid to other participants (in plenary or in small groups) for critique.

EXERCISE: GIVING AN EXPLANATION/LECTURE

PURPOSE: To practise delivery of an explanation

TIME: 15 minutes preparation
3-4 minutes presentation

INSTRUCTIONS:

1. Select a topic for presentation from your lesson materials that you expect will take about 3 minutes.
2. Prepare for delivery by following the preparation steps outlined in the **Instructional Techniques Reference Material, Giving Explanations**. Include at least one visual to support your explanation.
3. Present your explanation to another participant or in plenary for critique. (audience to depend on size of class) Use the checklist which follows to critique the presentation(s).

CHECKLIST FOR EXPLANATIONS

ITEMS	YES/NO	COMMENTS
1. material presented in a framework?		
2. consider previous skills/knowledge?		
3. structure evident?		
4. introduction effective?		
5. message clear, concise, coherent?		
6. examples used?		
7. visual support?		
8. conclusion effective?		
9. time managed?		
10. presentation techniques		
- varied pitch, volume of voice?		
- appropriate pace of speech, pauses?		
- movement, gestures natural?		
- maintained eye contact?		

EXERCISE: ACKNOWLEDGING PARTICIPANTS' ANSWERS

PURPOSE: To outline a strategy for acknowledging answers to questions

TIME: 6 minutes

INSTRUCTIONS: Work with another participant to come up with a suggested strategy for handling the following types of participant answers.

- Make notes on the options available to you as instructors.
- Provide an example for each type of response.

1. Correct answers

2. Partially correct answers

3. Incorrect answers

EXERCISE: PREPARING QUESTIONS

PURPOSE: To prepare questions

TIME: 6 minutes preparation
15 minutes plenary /pairs

INSTRUCTIONS:

1. a) Examine a teaching point from your lesson materials to identify appropriate places to use questioning.
- b) Prepare two questions related to the content OR identify two questions which have been suggested by the designers.

For each question,

- Identify the intended use
 - Assess the quality of each question against criteria for questions
 - Suggest what the participant responses might be and how you would acknowledge them
2. Present your questions for critique in plenary/in pairs.

EXERCISE: EXAMINING EXERCISES

PURPOSE: To identify the use of exercises in lesson materials

TIME: 10 minutes

INSTRUCTIONS:

Examine a lesson for the use of exercises and answer these questions.

1. What types of exercises are in the lesson design?
2. How much time is provided for the completion of each of the exercises?
3. What instructions are provided to the participant?
4. What guidance is given to the instructor/facilitator?
5. How will the participants get feedback on their performance?

EXERCISE: IMPLEMENTING EXERCISES

PURPOSE: To practise either an introduction or a take up of one of the exercises/activities in your training package

TIME: 10 minutes preparation
3 - 5 minutes presentation
5 minutes feedback

INSTRUCTIONS:

1. Select one exercise/activity that you would like to practise.
2. Refer to the **Instructional Techniques Reference Material, Implementing Exercises Effectively** as your resource.
3. Prepare to introduce or conclude the activity. (10 minutes)
4. Present your introduction or debriefing (take up and /or summary) to the identified group of participants.
5. Provide feedback to the others in your group using the following checklist.

INTRODUCTION

1. exercise/activity presented in context of lesson
2. directions clear
3. understanding of instructions verified

DEBRIEFING

1. feedback on performance
2. critical points summarized

NOTE TO PARTICIPANTS

The exercises which appear on the following pages are designed to provide participants with practise in the instructional methods specific to their training packages.

With your workshop facilitator, you will be given the opportunity to determine which of the exercises would best suit the needs of your group in relation to the training package you are working with.

Ideally, you will want to practise those that are the most common to the course/workshop you are to facilitate.

EXERCISE: FACILITATION OF GROUP DISCUSSION ACTIVITY

PURPOSE: To practise the facilitation of a group discussion activity

TIME: 10 minutes preparation
5 to 8 minutes presentation
3 to 5 minutes feedback

INSTRUCTIONS:

1. Refer to the reference material on **The Group Discussion Instructional Methods and Effective Questioning** as your resources for this activity.
2. Select a teaching point from your training package which is identified as one using question and answer/discussion/brainstorming as the instructional method.
3. Prepare to facilitate the discussion activity for a group of 4 - 5. (10 minutes)
4. Have each member of your group facilitate the discussion in turn to a maximum of 8 minutes: provide feedback to each discussion leader immediately after the discussion.
5. In plenary/ in your group list examples of effective behaviours for a group discussion leader.

EXERCISE: GIVING DEMONSTRATIONS/WALKTHROUGHS

PURPOSE: To practise giving a demonstration /walkthrough

TIME: 12 minutes preparation
5 to 8 minutes presentation
3 to 5 minutes feedback

INSTRUCTIONS:

1. Refer to the reference material on **Giving Demonstrations/Walkthroughs** as your resource for this activity.
2. Select a teaching point from your training package which is identified as one using demonstration/ walkthrough as the instructional method.
3. Prepare to present the demonstration/walkthrough. (12 minutes preparation)
4. Have each member of your group present their demonstration /walkthrough in turn to a maximum of 8 minutes: provide feedback to each presenter immediately after the presentation.
5. In plenary/ in your group, highlight the important aspects of giving a demonstration/walkthrough.

EXERCISE: IMPLEMENTING ROLEPLAY ACTIVITIES

PURPOSE: To practise the implementation of roleplay activities using a given training package

TIME: 70 minutes

INSTRUCTIONS:

1. Refer to the reference material on **Experiential Learning as an Approach to Instruction, Implementing Roleplay and Coaching in the Classroom** as your resources for this activity.
2. Select a learning activity from your training package which identifies roleplay as the instructional method.
3. Examine the material to determine
 - the purpose of the roleplay
 - what is expected of the roleplayers and observers
 - the information provided to the participants
 - the directions provided to you as the instructor/facilitator
4. Prepare to introduce the roleplay activity and present your introduction to two other participants/in plenary for feedback.
5. In plenary, observe a roleplay acted out in fishbowl/ or on video (as previously arranged by your workshop facilitator). As you observe, prepare to debrief this roleplay as if you were the facilitator of the session.
6. Select a volunteer from your class to debrief the roleplay in plenary. Observe this debrief, noting what was effective and suggestions you have for improvement.
7. Provide feedback in plenary to the volunteer and listing those things you will want to remember about debriefing roleplays.

EXERCISE: COACHING PARTICIPANTS IN TRAINING

PURPOSE: To practise the coaching of participants during performance of practise exercises

TIME: 85 minutes

INSTRUCTIONS:

1. Refer to the reference material on **Implementing Exercises Effectively, Experiential Learning as an Approach to Instruction, and Coaching in the Classroom** as your resources for this activity.
2. Select a learning activity from your training package which requires that the facilitator/instructor be involved in the coaching of participant performance.
3. Work in groups of three/four to set up situations where participants are completing learning activities which require coaching. Assign the role of coach, participant(s), and observer(s) to the members of your group.
4. Prepare to coach the participants by examining the materials, noting
 - the purpose of the exercise
 - what is expected of the participants
 - the information provided to the participants
 - the directions provided to you as the instructor/facilitator

Allow 5 - 10 minutes for this preparation.

5. Practise, in rotation, the role of coaching participants for a portion of the exercise. Stop the roleplay after seven minutes and provide feedback to the coach for a maximum of five minutes.
6. Meet in plenary to report on the coaching observations and to highlight the important features of coaching in the classroom.

EXERCISE: IMPLEMENTING CASE STUDY/SIMULATION ACTIVITY

PURPOSE: To practise handling the case/simulation learning activity

TIME: 80 minutes

INSTRUCTIONS:

1. Refer to your training package to identify where case study/simulation is identified. Note the following:
 - what is required of participants
 - what information is available to participants
 - what is required of the instructor/facilitator
 - what additional information is provided for instructors/facilitators
2. In plenary, discuss your findings.
3. Refer to the reference material, **Implementing Case Studies and Simulations** noting the suggested preparation steps. Discuss in plenary the reason for each step.
4. Select from you training package one of the case/simulation activities and prepare to introduce it to a group of participants.
5. Working in groups of three, deliver your introduction to the other two participants and solicit feedback from them on the clarity of your presentation.

EXERCISE: USING VIDEO MATERIALS IN TRAINING

PURPOSE: To practise the use of video materials

TIME: 80 minutes

INSTRUCTIONS:

1. Refer to your training package to identify the purpose of the use of video materials.
 2. In plenary, list the preparation and implementation activity expected of the instructor/facilitator. Compare your list with those items in the reference material, **Using Video Materials**.
 3. Select one of the learning activities requiring the use of video materials and prepare to introduce it.
 4. Working in small groups/in plenary, present your introduction to the learning activity. As each presentation is complete, provide feedback to the presenter on the clarity of the information presented. *
 5. In plenary, discuss the question, **How does the use of video in the training session differ from video as entertainment?**
- * If your materials call for a take up of a particular video segment, you may wish to practise that in place of the introduction.

EXERCISE: CONCLUDING TRAINING SESSIONS

PURPOSE: To determine what makes an effective conclusion

TIME: 40 minutes

INSTRUCTIONS:

1. In plenary/small groups, answer the question,
What is the effect of a conclusion on the success of a lesson/course/workshop/module?
2. Refer to your training package to identify where conclusions are identified. Note the following:
 - how much time is assigned to the conclusion
 - what the elements of the conclusion are
3. Prepare a conclusion to one of the lessons/modules.
4. Share your preparation results with another participant by describing what you will do or by practising the delivery.

EXERCISE: CO INSTRUCTION

PURPOSE: To use the Co Facilitating Worksheet

TIME: 20 minutes

INSTRUCTIONS:

1. Refer to the **Instructional Reference Materials, Co instruction**, as your resource.
2. Allow yourself 10 minutes to work through the items found on the first page of the worksheet, **A. Pre interview Inventory**, making notes to which you can refer.
3. Working with a colleague who may be your co instructor, begin the interview as described in **B. Initial Interview**.
4. Share your reaction to the experience in plenary session.

PERFORMANCE CHECK: FACILITATING LEARNING ACTIVITIES

Throughout this lesson you have been asked to prepare and facilitate learning activities representative of those identified in your assigned training package.

Your cumulative performance in each of these activities is to serve as the measure of your achievement of the lesson objective.

INSTRUCTIONS

Reflect back on your practise in each of the exercises to answer these questions.

1. What did you identify as important to your success as a facilitator /instructor?
2. What things do you plan to focus on to improve your performance?

LESSON 5: MANAGING THE LEARNING ENVIRONMENT

	PAGE
LESSON OBJECTIVE.....	5.1
EVALUATION OF OBJECTIVE	5.1
LESSON OUTLINE	5.1

EXERCISE: THE ISSUE OF MOTIVATION

EXERCISE: IDENTIFYING CHALLENGING SITUATIONS

PERFORMANCE CHECK	5.4
-------------------------	-----

LESSON 5: MANAGING THE LEARNING ENVIRONMENT

LESSON OBJECTIVE

At the end of this lesson participants will be able to

Performance: identify appropriate action for handling specific challenging situations within a group of learners

Conditions: given course materials
individually
with assistance

Standard: according to guidelines provided during the lesson

EVALUATION OF OBJECTIVE

Participants will be asked to apply a model for dealing with challenging situations to case studies which describe actual classroom situations.

LESSON OUTLINE

1. Managing Group Dynamics for Learning
2. Handling Sensitive Topics (Optional)

EXERCISE: THE ISSUE OF MOTIVATION

PURPOSE: To identify ways to deal with the issue of motivation as it relates to both the participant and the instructor

TIME: 10 minutes in groups
20 minutes in plenary

INSTRUCTIONS:

1. Working in small groups, generate a list on a flipchart to answer **one** of the following questions.
 - What factors are motivating for the instructor/facilitator during a training session?
 - What factors are motivating for the participants during a training session?
2. Share your results in plenary session.

EXERCISE: IDENTIFYING CHALLENGING SITUATIONS

PURPOSE: To list the most challenging situations you, as an instructor/facilitator, could face.

TIME: 5 minutes preparation

INSTRUCTIONS: Individually, list the three most difficult situations you think you could encounter in a class, and describe how you would deal with them.

1. Describe the situations

a)

b)

c)

2. Describe briefly what you would do.

a)

b)

c)

3. Be prepared to share the results of this exercise with the group.

PERFORMANCE CHECK: DEALING WITH CHALLENGING SITUATIONS

PURPOSE: To provide you with the opportunity to apply the responding model for dealing with challenging / problem situations.

TIME: 30 to 45 minutes

INSTRUCTIONS:

1. This exercise may be completed individually, in pairs, or in small groups.
2. Select one of the situations presented to you on the next page.

(Depending on the number of participants, your instructor may assign you a situation; otherwise, the instructor will ensure that each individual, pair or group has selected a different situation).

3. Apply the first two steps of the responding model. In assessing the situation you may find a number of hypotheses. Select a response for each possible scenario.
4. You will be asked to present your responses to the group in plenary.

CHALLENGING SITUATIONS

1. This participant reads his newspaper during class. He/she does not participate in class unless called upon and chooses to arrive late and begin to pack up early.
2. This participant always has a comment to make on every topic. Often he/she interrupts the flow of the lesson with comments that do not really relate to the lesson objective.
3. This participant rarely volunteers to participate. When he/she responds to a direct question, the answer is usually too soft to be heard by others. The exercises seem to be a challenge.
4. This participant brings his sense of humour to class and shares it willingly. He/she can turn every situation into a "laughing" matter.
5. This participant brings a lot of work-related experience to the training classroom. He/she always has the answer to questions and consistently brings up complex "real" situations which relate to the topic under discussion. As an instructor, you feel threatened by his expertise.
6. This participant looks for and finds things to complain about. "The room is too warm, the breaks are too short, the course materials contain errors, the group exercises are foolish..."

LESSON 1: CONFIRMING CONTENT EXPERTISE

	PAGE
LESSON OBJECTIVE.....	1.1
EVALUATION OF OBJECTIVE	1.1
LESSON OUTLINE	1.2

EXERCISE: IDENTIFYING QUESTIONS ON CONTENT

PERFORMANCE CHECK.	1.2
-------------------------	-----

LESSON 1: CONFIRMING CONTENT EXPERTISE

LESSON OBJECTIVE

At the end of this lesson participants will be able to

Performance: answer their own questions relating to the subject matter of the training materials

Conditions: given a training package
individually
with assistance

Standard: according to guidelines provided during the lesson

EVALUATION OF OBJECTIVE

Participants will be asked to answer the questions they identified about the subject matter of the training package.

LESSON OUTLINE

NOTE TO PARTICIPANTS: This segment of training focuses on the content of the particular course(s)/ workshop(s) you are to deliver. To assist you in becoming confident with the content of your assigned course, your facilitator will have chosen **ONE** of the following options:

1. Deliver the specific course/workshop in its entirety to the participants as if they were members of the target population so that they experience the workshop as intended by the design. This experience would serve as an opportunity for them to acquire the necessary subject matter expertise.

If this option is chosen, participants are to clarify their concerns about the subject matter before proceeding with Lesson Two, Using the Training Package.

2. Present content training to participants using an approach other than the training package. This could involve presentation from a subject matter expert, video films, or reading and discussion. This might be the best option where facilitators require more depth than the training materials provide. (e.g., nutrition as it relates to stress management)

EXERCISE: IDENTIFYING QUESTIONS

ON CONTENT

PURPOSE: To list the questions/concerns you have so that they can be addressed during this segment

TIME: 15 minutes preparation

INSTRUCTIONS:

1. Consider each of the topics presented in your training package. Based on your experience on the job and with the content during its presentation to you, record any questions related to the content that still remain unanswered for you. (in making your list, limit your questions to issues related to the subject matter; avoid those dealing with the method of instruction)
2. In plenary session, present your questions as directed by the workshop facilitator. Record from the discussion those points which contain the answers you seek.

PERFORMANCE CHECK: ANSWERING QUESTIONS ON CONTENT

PURPOSE: To confirm you have answers to the list of questions/concerns you prepared

TIME: 10 minutes

INSTRUCTIONS:

1. Refer to the list of questions you prepared in the previous exercise.
2. Determine, for each of your questions, how you would answer them if they were posed to you.

WORKSHOP PERFORMANCE CHECK

PURPOSE: This activity provides you with an opportunity to practice what you have learned during the workshop. You will prepare, deliver and receive feedback on a portion of the lesson plan you have been working with.

TIME: 60 minutes preparation
20 minutes presentation
10 minutes feedback

INSTRUCTIONS:

1. Choose a portion of your training package that will allow you to practise the facilitation of learning as the final teaching presentation for this workshop. Plan for about 20 minutes of delivery time.

NOTE: For those who will be working as co instructors, they may choose to do this final facilitation activity in pairs. Their combined delivery time is 40 minutes.

2. Examine the **Observation Checklist** on the following page; this is the feedback tool for this exercise.
3. Refer to the topics in the reference materials related to the type of instructional methods involved in your portion of delivery and to the topic, **Preparation: Personalizing a Lesson Plan.**
4. Personalize this segment of the lesson by:
 - a) **relating this segment to the lesson objective**
i.e, how does this material fit into the achievement of the lesson objective?

- b) **identifying where this segment fits into the lesson structure**
- i.e., is this segment part of the introduction, body, final exercise or conclusion of the lesson?
- c) **determining how the lesson design tries to meet the needs of learners in the learning process**
- i.e., how does the activity expected of the learners contribute to their learning?
- d) **identifying the instructional methods and the details of delivery provided**
- i.e., note the key points and the key learning activities?
- read the reference material
- highlight the key words, noting examples and checking or adding references
- confirm the timing
- e) **planning the use of visual support to include a MINIMUM OF TWO different types, if possible**
- i.e., note what visual support is suggested and add others as necessary
- f) **identifying where instructor explanation is required**
- i.e., prepare explanations, adding any personal examples and anticipating questions
- g) **planning the use of questioning to include a minimum of FIVE QUESTIONS, if appropriate**
- i.e., note where questions are suggested and add others as necessary, anticipating what the responses might be

h) **determining the role of exercises and planning instructor/facilitator activity related to them**

i.e., prepare to introduce, coach, and follow up

5. Review the **Observation Checklist** to remind yourself of the important criteria for effective instruction/facilitation.
6. Deliver your portion of the lesson as if you were teaching to the target population. (Your instructor will provide you with the guidelines for this activity.)
7. Be prepared to share your experience from this activity in plenary session.

OBSERVATION CHECKLIST

CHECKLIST ITEM	PRESENT	COMMENTS
1. Organization structured to support learning process - presented effective introduction - linked individual parts - included summary and link in conclusion		
2. Learning climate established demonstrated mutual respect - presented positive, warm approach - encouraged participants to share opinions and ideas - adapted to participant need for information - handled sensitive situations effectively		
3. Presentation style contributed to success - appeared prepared and organized - referred to notes without reading them at length - maintained eye contact - gestures and movement natural - voice tone, rhythm of speech and volume appropriate - used natural pauses in speaking		
4. Instructional techniques were used effectively - related content to job performance - related content previous skills and knowledge - used relevant questions to stimulate thinking/confirm learning; applied questioning process (APPLE) - acknowledged participant contributions - provided clear, coherent, concise explanations - used examples; requested examples - used visual support where needed - provided clear instructions to exercises/activities - coached learner performance during exercises - managed time as intended - followed lesson plan - recognized and addressed lack of understanding		
5. Content Competency - knowledge accurate - skills demonstrated		

WORKSHOP CONCLUSION

This segment of the workshop will allow you the opportunity **to reflect upon what you have learned** as a result of the training session.

It will also give you the opportunity to consider the possibilities for **ongoing self assessment** as a means of developing your facilitation of learning skills.

Finally, it will deal with the topic of **handling the administration** for delivering your training.

Before you look at the exercises, refer to the workshop training objective, the workshop outline and your list of expectations from the workshop introduction to assess the success of this training session for you.

The exercise which follows is designed to guide you through the review of the course activities.

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EXERCISE: ACTION PLANNING

PURPOSE: To prepare an action plan

TIME: 15 minutes

INSTRUCTIONS:

1. Using the **Action Planning Worksheet** which follows, record the most significant experience/things you learned from the workshop. These should come to mind quickly and easily.
2. Review the feedback you received and record the feedback that stands out as being the most important for you. Include your strengths as well as areas for improvement.
3. Review the characteristics of an ideal instructor and identify and record those skills and characteristics that you would like to develop further.
4. From these three areas, identify the **five** most important items, the experience/things you learned, the skills or characteristics you would like to concentrate on for your own personal and professional development as an instructor/facilitator.

EXERCISE: EXPLORING SELF ASSESSMENT

PURPOSE: To note down considerations for ongoing self assessment

TIME: 10 minutes

INSTRUCTIONS:

1. Based on your examination of the **Instructor/Facilitator Self Assessment Tool** found on page 102-106 of the **Instructional Techniques Reference Material**, note those items which will be of particular interest to you personally.
2. From the following list, identify the means you would consider for improvement of your performance of a facilitator on the job.
 - using self assessment
 - gathering immediate feedback from participants
 - arranging for an observer to provide feedback
 - using the services available from the Training and Development Organization of Revenue Canada
 - doing additional reading on learning and training

EXERCISE: HANDLING ADMINISTRATION

PURPOSE: To make a list of the issues relating to administration of the training session to be addressed as part of your preparation

TIME: 5 minutes

INSTRUCTIONS:

1. Refer to the reference material, **Handling the Administration of Sessions**.
2. Discuss those items in plenary that you have questions about.
3. Prepare a list of the things you will need to address as part of your preparation activity.

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**Bosnia and Herzegovina
Federation of Bosnia and Herzegovina
Federal Ministry of Finance
Customs Training Commission**

INSTRUCTIONAL TECHNIQUES COURSE

**Reference Material
1997**

The Federal Minister of Finance, Mr Drago Bilandžija accepted the Training Commission's Report and Training plan on December 30, 1996.

The Training Program has been developed by the Federal Ministry of Finance, the Federation Customs Administration, the European Commission Customs and Fiscal Assistance Office (CAFAO) and the US Agency for International Development (USAID).

INSTRUCTIONAL TECHNIQUES
REFERENCE MATERIAL

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This text is dedicated to all those who would know the joy of facilitating the learning of others.

THE LEARNING ORGANIZATION

As we move into the next decade, society is becoming aware of the need for quality and the need to be proactive in its pursuit. Quality is recognized both by the organization and the individual as the means for providing clients with the service they expect and employees with increased job satisfaction.

Quality can only be achieved in an environment where learning is valued and improvement through change is encouraged.

A Learning Organization promotes learning, innovation and freedom for individuals to perform to new levels of personal capacity. It can be said that the operation is one of continuous improvement, one in which both the individuals and the organization benefit. Its development starts with the sharing of a common mission for the organization with which individuals can identify.

As instructors/facilitators involved in training, we have an important role to play in the evolution towards becoming a learning organization. The training we are responsible for must be seen as involving the acquisition of new skills which will lead to the achievement of a high performance quality focused service organization.

Our challenge, as those identified to carry out training tasks, is to make our training sessions of the highest quality possible. This reference material is prepared with that goal in mind. The success of the learners can be the measure of our success and the source of increased job satisfaction for all.

SYSTEMS APPROACH TO TRAINING (SAT)

FCA is responsible for training employees so that they can perform their job tasks efficiently and effectively. This training takes place either on the job site or in classrooms.

During planned learning activities, employees are provided with the opportunity to acquire the knowledge, skills and/or experience essential to perform specific parts of their job. These employees are, in fact, able to achieve the specific training objective at the end of that particular training session.

1. DEFINITION OF TRAINING

Training has been defined as a learning activity in which trainees are provided with the opportunity to acquire knowledge, skills and experience necessary to perform specific job tasks effectively and efficiently. This definition is now expanded to include any consciously applied mechanism which facilitates learning and development of individuals.

Since our world today necessitates using the resources we have to the fullest, it is important that those resources assigned to learning activity be used where they are most required.

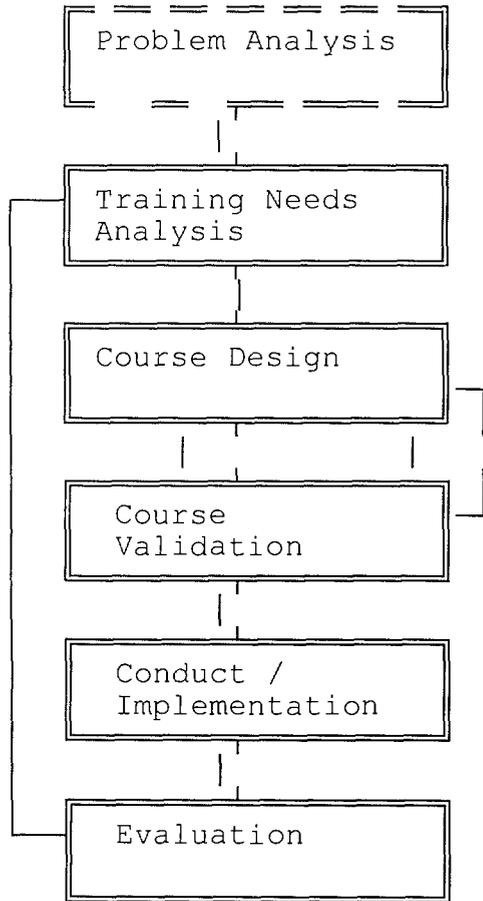
Whether on the job or in the classroom, the training for all customs employees is conducted within the flexible, but common sense approach of the **Systems Approach to Training**. Following a systems model, the Systems Approach to Training (SAT), makes it more likely that the training delivered to employees will be both effective and efficient.

2. PHASES OF THE SYSTEMS APPROACH TO TRAINING (SAT)

There are five phases in the Systems Approach to Training. Each of the five phases plays an important part in contributing to the effectiveness and efficiency of the training.

For the five phases of S.A.T. see the diagram which follows.

SYSTEMS APPROACH TO TRAINING



- determination of the problem which can be solved by training
- formulation of training objectives based on identified training needs
- preparation of training packages leading to achievement of training objectives
- pilot testing of course content and methodology
- delivery of training to target population
- assessment of the impact of training on job performance

ROLE AS FACILITATOR OF LEARNING

Our department selects its instructors/facilitators from a pool of competent subject matter experts (SME's). These SME's receive training packages that have been designed to meet the training needs of a specific group of participants. They also receive training in facilitating learning in a classroom situation.

1. RESPONSIBILITIES OF INSTRUCTORS/FACILITATORS

The role of an instructor/facilitator is to support the learning process. This support is often referred to as facilitation. Instructors/facilitators can succeed in this facilitation by following the design of the training materials and by using proven instructional techniques.

As facilitators of learning, instructors/facilitators focus on how what they are doing influences their participants' learning experience. Unlike the traditional teacher-centred approach in which instructors are expected to entertain or impress learners, instructors as facilitators of learning are **learner-centred**, i.e., their primary emphasis is on getting the learners involved in achieving the training objectives.

2. REQUIRED KNOWLEDGE AND SKILLS

Instructors/facilitators require expertise in two main areas. They include the following:

1. Subject matter expertise

Instructors/ facilitators must be as confident as possible of the subject matter i.e., the course content in order to be able to serve as a resource to the learners.

2. Expertise in instructional techniques and group facilitation

Instructors/facilitators must have knowledge and skills related to the following:

KNOWLEDGE

- the learning process
- instructional methods

- the use of visual support
- group dynamics

SKILLS

- organizing the training session
- interpreting training materials
- presenting information
- coaching learners
- using questions
- leading discussions
- handling sensitive topics
- managing group learning activities

THE LEARNING PROCESS

The learning process is an important consideration in the planning of training programs, since, in training, the learners are expected to acquire the knowledge, skills and/ or experience relevant to job performance.

All learning activities in a training session are set up to ensure that the training objective is achieved in the most effective and efficient manner possible. Instructors/facilitators must keep the learning process in mind as they personalize their lesson plans.

1. LEARNING AND LEARNERS

1.1 DEFINITION OF LEARNING

Learning is the process of change in which new knowledge, skill(s) or attitude(s) are acquired. Evidence that learning has occurred is demonstrated by a change in behaviour.

e.g., Where a learner has been involved in a situation where he/she is learning to drive a car, the evidence that learning has occurred might include the following:

- the learner can explain the rules of the road
- the learner can drive the car safely according to the law
- the learner expresses acceptance of the laws being enforced

These three changes in behaviour are evidence that the learning experience has affected the knowledge, the skills and the attitude of the learner.

1.2 CHARACTERISTICS OF LEARNERS

Learner needs are the basis for the planning of learning activities. In trying to determine the best approach for training department employees, instructors/facilitators should assess the learners in terms of their characteristics, first, as individuals, and second, as adults.

1. LEARNERS AS INDIVIDUALS

Individual learners coming to a learning situation are unique. As a result of their life experiences, they have developed their own personalities, specific areas of expertise, individual preferences for operating, and identifiable beliefs and values. This "baggage" affects their learning style and thus their success in achieving the desired training objective.

Learning style refers to the way an individual learns best. An individual's success in learning situations is dependent on whether or not the individual is able to benefit from the experience provided.

For example, one learner might be best able to acquire knowledge on a new topic by listening to a lecture, while others might prefer to read a paper, watch a film or participate in a discussion.

Course designers and instructors/facilitators must consider that individual learners have specific needs which the training session must meet in order to ensure that learning is successful. They must respond with a variety of learning activities that can meet these individual needs.

2. ADULTS AS LEARNERS

Although individual learners in any learning situation have specific needs, there are some general truths about adults as learners that effective training must address.

The research conducted on adults as learners has produced four significant findings that should be considered by both designers and instructors of adult training programs. They include the following:

- * Adults are capable of self-direction.
- * Adults bring experience to the learning situation.
- * Adults need to see the benefits of what they are learning.
- * Adults learn best if they have the opportunity to apply what they are learning.

Well designed training programs take these findings into account to provide adults with learning activities which result in successful learning experiences.

In the approach to training at FCA the learning process is seen as critical both to the design and the implementation of that training. Customs Training Commission and instructors are encouraged to meet learners' needs by considering both the specific needs of individuals and those of adult learners more generally.

The approach results in training packages in which course designers and instructors

- * provide content in a **work context**
- * divide the material to be learned into **digestible chunks**
- * allow learners to **practice** what they are learning
- * ensure **clarity**
- * provide **stimulation**

1.3 INSTRUCTOR'S ROLE AS FACILITATOR OF LEARNING

The role of an instructor is to facilitate the learning process. This is accomplished by following the design of the training materials and by using proven instructional techniques.

Instructors/facilitators of learning are learner-centred, i.e., their primary emphasis is on getting the learners involved in achieving the training objectives.

To clarify the **Facilitator's Role**, consider the learning process as it is presented in the **Learning Ladder**.

2. THE LEARNING LADDER

2.1 LEARNING LADDER AS A MODEL

The learning ladder is a model which illustrates the connection between training course design, instruction, and the learning which occurs during training.

The ladder is set in a firm foundation of the results of a needs analysis. It is from a close examination of learner's needs that the required knowledge and skills necessary for job performance are identified.

The ladder itself symbolizes the step by step process of the learning necessary to achieve the training objective. Thus the training objective is situated at the top of the ladder.

On either side of the ladder are the components of design and instruction . It is through good design and quality instruction that learners are guided to make their way up the ladder to the achievement of the training objective.

2.2 HOW DESIGN AND INSTRUCTION SUPPORT MODEL

1. DESIGN

Course designers take into consideration what we know about learning as they design course materials. They plan the learning activities to accommodate the learners' needs for context, digestible chunks, and practice.

1.1 CONTEXT

Learners will learn better if they are able to see that the learning is relevant to their needs.

- learners need to know what the benefits of learning the particular knowledge and skill are
i.e., learners must see the relationship between what they are learning and performance on the job
- learners must know what the objective of the learning activity is

1.2 DIGESTIBLE CHUNKS

Since learners bring experience to the learning situation, they have a readiness level for new learning. This readiness level and the rate of learning varies with the individual learner.

However, all learners will learn better if the material to be learned is divided into a logical sequence of teaching points grouped into lessons.

- dividing the material into smaller chunks makes it possible for learners to build on what they already know
- limiting the focus to the "need to know" ensures that learners are able to assimilate new information more easily
- presenting content using lesson structure and appropriate frameworks (e.g., known to unknown) makes material digestible to all learners

1.3 PRACTICE

Learners require the opportunity to apply what they are learning. They welcome a problem solving approach which allows them to learn by doing.

Providing practice during the learning situation develops skills and increases retention.

- the practice can include use of questions, exercises, or simulation of job tasks
- the practice should be accompanied by feedback

2. INSTRUCTION

Course instructors are responsible for implementing the given design in a way which ensures that the learning process is successful. This means that instructors must pay particular attention to the clarity and stimulation aspects of the delivery of training.

2.1 CLARITY

The learners must be able to make sense out of the training presentation. To ensure the message is meaningful, instructors can

- present training objectives
- use appropriate examples
- provide well-structured learning activities
- use visual support
- use language appropriate to level of participants
- introduce, develop, and summarize as required
- verify understanding through use of questions
- adapt to needs of participants

2.2 STIMULATION

Instructors have the task of stimulating learners. Stimulation increases the activity of the brain and keeps learners aroused and alert to deal with the learning environment. Through stimulation, instructors are able to sustain learning.

Some ways to stimulate learners include

- encouraging participation
- varying presentation methods and techniques
- relating personal experiences
- conveying a sense of enthusiasm
- presenting objectives and the relevant outlines
- using visual support
- using humour

THE TRAINING PACKAGE

Training packages are designed to respond to the specific needs identified in the target population. The training package is the product of the "DESIGN" and "VALIDATION" phases of the Systems Approach to Training. The delivery of the training according to designed learning activities is part of the "IMPLEMENTATION" or "CONDUCT" phase.

The production of training packages results in the design of materials to be used by instructors and participants.

1. ADVANTAGES OF A TRAINING PACKAGE

Two benefits of designing training packages for instructors include the following:

1. EFFICIENT USE OF RESOURCES

Training packages encourage an efficient use of resources. They provide the instructor with the necessary participant materials and information on the process of instruction as it relates to the content of the course. Instructors receive information on the methods, training aids and timing used to develop each teaching point and thus are saved lengthy preparation time spent on design issues.

2. EFFECTIVE IN THE ACHIEVEMENT OF TRAINING GOALS

Having training packages for instructors ensures that the training delivered will be of consistently high quality. The lesson plan is designed to address the identified needs of the target population; the learning activities suggested in the materials for the instructor and the participant are the result of a pilot test to determine that the level of detail and the methodology are appropriate, i.e., that they will be successful in participants achieving the stated training objective.

2. COMPONENTS OF A TRAINING PACKAGE

The production of training packages includes the design of materials to be used by PARTICIPANTS AND INSTRUCTORS. These materials include the following:

1. PARTICIPANTS MATERIALS

- Handouts - contain the summary notes for participants. They should serve as useful reference material after training.
- Exercises - contain the practise activities which the participants complete during the training session

Designers determine the content and format of the participant material on the basis of the following:

- the nature of the subject matter
- the methods selected
- the existing documentation, i.e, reference manuals, text materials, guides
- the identified conventions, standards and specifications
- the post-course requirements for reference material

Generally, Customs Training Commission, training packages develop handouts and exercises for participant use during the training session. In many situations, this is provided as a take-home Participant Manual which can be used for future reference.

2. INSTRUCTOR MATERIALS

Lesson Plan - contains the direction to instructors for the implementation of the training session

Visual Support - contains the prepared transparencies and flipcharts for course delivery

Designers prepare all the materials required by the instructor for quality course delivery.

Customs Training Commission has determined the format for Instructor Lesson Plans/Guides.

3. COURSE AND LESSON STRUCTURE

The following pages clearly outline the structure of the training packages produced by Customs Training Commission.

This structure is supportive of the learning process.

STRUCTURE OF A COURSE AND LESSON

<p>COURSE INTRODUCTION</p> <p>* Course Training Objective</p>		
LESSON ONE	LESSON TWO	LESSON THREE
<p>* INTRODUCTION</p> <p style="padding-left: 20px;">- Lesson Enabling Objective</p> <p>* BODY</p> <p style="padding-left: 20px;">- Teaching Points & Methods</p> <p>* TEST</p> <p>* CONCLUSION</p>	<p>* INTRODUCTION</p> <p>* BODY</p> <p>* TEST</p> <p>* CONCLUSION</p>	<p>* INTRODUCTION</p> <p>* BODY</p> <p>* TEST</p> <p>* CONCLUSION</p>
TEST		
COURSE CONCLUSION		

INTRODUCING THE SESSION

1. PURPOSE OF AN INTRODUCTION

The introduction to a course, module or lesson is important to the success of any training session and should be planned very carefully. During the introduction, the instructor's/ facilitator's goals are to prepare the learners to learn, to establish a climate conducive to learning, and to gather key information about the learners.

1.1 PREPARING LEARNERS

Learning occurs best when individuals are motivated to learn. The introduction prepares the learners by capturing their attention, stimulating interest and by creating a need to learn the subject or skill in question.

Adult learners want to see how what they are to learn is relevant to their needs, i.e., the context for the learning activity must be provided.

1.2 ESTABLISHING CLIMATE

The main role of an instructor/facilitator is to facilitate the learning process. The introduction to a session should establish a climate of cooperation and of mutual respect where the facilitator/instructor is perceived as a member of the team, willing to accept input from learners and to give them feedback on their performance.

Ideal conditions are set when a positive, non-threatening atmosphere is created where the instructor/facilitator demonstrates assertiveness while respecting the different needs, styles and preferences of the learners.

1.3 GATHERING INFORMATION ABOUT LEARNERS

Learning involves relating new knowledge or skill to past experiences. Adult learners come to a learning situation with different backgrounds, personalities, preferences and needs. They have also accumulated growing reservoirs of varied experiences which should be drawn upon as resources for learning and for sharing with others.

Introductions provide the instructor/facilitator the opportunity to learn about the participants' expertise, styles and expectations; this information will assist him/her in adapting the delivery of the material.

2. COMPONENTS OF AN INTRODUCTION

An effective introduction contains four essential components. To assist you in remembering these key components, they have been formulated into the acronym **LOOM**, which represents **Link**, **Objective**, **Outline** and **Motivation**. The explanation which follows summarizes the important information for instructors/facilitators.

2.1 LINK

Adult learners need to see where and how a course or lesson fits into a larger training program or course.

The instructor must situate the course or lesson, explain why it is presented, and ensure that it is linked with what the learners already know from experience or what they will learn in the future.

Linking the topic to the learner's job and/or personal situation facilitates learning. It provides learners with a context for learning.

2.2 OBJECTIVE

A training package is the product designed to meet specific objectives. At the needs analysis phase, what the learners need to know and what they already know are identified. Decisions are then made as to what to teach in a course based on the frequency and the complexity of tasks to be performed. These decisions result in the course/module and lesson objectives.

Each objective is a clear and precise description of an **intended result** which is both **observable** and **measurable**. It focuses on the expected behaviour change of the learner. It does not describe what the instructor will do.

During the introduction, instructors/facilitators present the course and/or lesson objective.

1. COURSE TRAINING OBJECTIVE

A course training objective, often referred to as the course objective or the training objective, can be defined as the description of exactly what a learner will be able to do upon completion of the course, as a result of the training received.

Example: to calculate the amount of duty and taxes payable on imported goods.

This type of objective describes an improvement, change or new behaviour in performance, in terms of skills, which can be observed and evaluated at the end of the course.

2. LESSON ENABLING OBJECTIVE

The lesson enabling objective, usually referred to as the lesson objective, is the objective for one particular lesson. It describes exactly what the learner will be able to do upon completion of the lesson, as result of the training received.

Together, the lesson enabling objectives will lead to the attainment of the course training objective.

2.2.1 COMPONENTS OF AN OBJECTIVE

The course training objective and the lesson enabling objective include the following three components:

- . the performance statement;
- . the conditions;
- . the standard.

1. Performance Statement

The performance statement is a precise description of what the learner will be able to do at the end of the training period, using **one action verb** which is observable and measurable.

Example: at the end of the lesson, you will be able to write a memorandum.

2. Conditions

The conditions describe the circumstances under which the expected action is performed and evaluated. The conditions might include:

- . physical, time and safety factors;
- . provisions or restrictions imposed on resources such as facilities, equipment, forms, references;
- . supervision or lack of supervision;
- . with or without assistance;
- . alone or in group.

Example: Given the course material, the department procedures manual, an IBM PC computer,
alone
with assistance.

3. Standard

This part of the objective describes how well the learner should perform the expected action. It is the standard by which the participant's performance is evaluated. The standard might include:

quality: degree of accuracy; satisfaction of criteria and standards; conformity to an act, regulations, procedures or to a process.

quantity: number of units or elements required; rate; time limitations or speed of performance.

Example: correctly filing 60 files per hour, with a maximum error rate of 5%.

2.2.2 PRESENTATION OF OBJECTIVE

Learning is facilitated when the learners have a clear and precise notion of what they are expected to achieve. Objectives, in terms of performance, conditions and standard, should be provided in writing and explained verbally.

It is recommended that instructors display the objective for the duration of the session in order to refer to it when appropriate.

2.2.3 PRESENTATION OF EVALUATION OF OBJECTIVE

The instructor should explain how learners will be able to assess their attainment of the objective. It is important for the learner to know if the expected performance will be measured by a final exercise or by several exercises within the lesson (or within the course).

2.3 OUTLINE

The outline indicates the broad lines of the content and identifies the planned structure, approaches, methods, and schedules.

Presenting the outline is important as it provides the learner with "the big picture" and with a sense of direction.

2.4 MOTIVATION

Often addressed at the same time as the link, learner motivation is achieved by expressing the benefits of having acquired the new knowledge and skills. The instructor must stimulate interest and set the tone or atmosphere of the lesson by highlighting the relevance of the course or the lesson to the learners' needs.

INSTRUCTIONAL METHODS

Course designers have the task of selecting the best combination of learning activities to ensure that all learners will have the opportunity to achieve the course training objective. They are, in fact, selecting the instructional methods for the delivery of the required course content.

Course instructors/facilitators are responsible for implementing the learning activities as designed and adapting the instruction to the needs of participants. They must effectively deliver the content according to the "methods" described in the lesson plan.

1. TRAINING METHODS

There are a number of **training methods** used in the training of employees. These include instructor-led courses, modified instructor-led courses, self study courses, computer based training and on-the-job training and coaching.

The selection of method depends on the nature of the course content, the training environment, the characteristics of the target population, who the trainers are, and the available resources for design and implementation.

2. TRAINING METHOD VS INSTRUCTIONAL METHOD

In each of the training methods listed above, a number of teaching techniques can be employed. These techniques are often referred to as **teaching** or **instructional methods**.

These instructional methods are the means by which new material is presented to the learner; they are also the means by which learners are given the opportunity to practise using their new skills and knowledge.

Since instructors must be able to present training using a variety of instructional methods, it is important to examine them in more detail.

3. INSTRUCTIONAL METHODS USED

Some examples of instructional methods commonly used include the following:

- lecture
- demonstration / walkthrough
- question and answer
- discussion
- brainstorming
- practical exercises
- problem solving / discovery
- role play
- case study / simulation

These methods, effectively supported with examples, analogies, and visual support (i.e., charts, diagrams, exhibits) provide the means for instructors to guide the learners to achieve specific training objectives.

4. LEVEL OF LEARNER INVOLVEMENT

Each of the methods requires learners to interact with the lesson content in some way. The greater the learner involvement, the more effective the method is in supporting the learning process.

In anticipating the effective implementation of these methods, it is useful to consider what is expected of the learner in terms of the level of involvement.

Since learners learn best when they are **actively involved in the learning process**, instructors should examine how they implement the methods as suggested in the lesson plan to ensure that the effect of "LEARNING BY DOING" is maximized.

5. METHOD SELECTION

5.1 Factors

The instructional methods prescribed in the lesson plan are the result of designers considering the following factors:

- nature of content to be learned
- current level of expertise of participants
- time available
- training environment
- design resources
- concern for variety / individual learning styles
- level of learner involvement

5.2 Matching Method to Need

In deciding upon the instructional method, the most important question, of course, is "Will the method allow the learners to succeed in learning?"

The result of wise selection is a lesson plan which outlines the combination of methods which meet the needs of the learners, taking into account the available resources. The methods described have generally been tested through a validation process, so instructors can be confident of their effectiveness and efficiency.

6. IMPLEMENTING METHODS

The responsibility of the instructor is to present the course using the methods effectively. Since Customs Training Commission lesson plans tend to incorporate a variety of instructional methods, instructors must be competent in the techniques required for all instructional methods.

The following table summarizes the conditions and criteria for effective use of the most common instructional methods.

METHOD	CONDITIONS	CRITERIA
Lecture/ Reading	learner lacks expertise/ learner has expertise time is short concepts are easy	short as possible logical sequence appropriate framework appropriate visual support followed up with application
Demonstration	skills involved complex task	showing accompanied by clear explanation of logically sequenced steps short as possible repetition as necessary followed up with application

METHOD

Question & Answer/
Discussion/ Brainstorming

CONDITIONS

learners have expertise

content to be developed from
expertise

learners require stimulation /
guidance in thinking

CRITERIA

important points addressed

questions clear, concise, and
at appropriate level of
difficulty

clarify and reinforce answers

Practical Exercises/ Problem
Solving/ Discovery/ Role
Play/ Case Study/ Simulation

learners have knowledge/skill
base

learners require stimulation

learners require practice and
feedback

complex task

evaluate success of training

instructions clear and
complete

feedback on performance
provided

anticipate problem areas

coaching as required

follow up and summary
included

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USING VISUAL SUPPORT

Visuals are an effective means of supporting lesson content, no matter what the method selected. Since **projected visuals** such as overhead transparencies and computer slide-shows and **non-projected visuals** such as flipcharts, chalkboards and whiteboards are common in classrooms, these are the products selected for presentation.

Successful instructors are able to make the most out of the training aids available if they plan for the use of the visual and meet the criteria for both good design and use of the visual equipment.

1. RATIONALE FOR USE OF VISUALS

Visuals serve as a **support to the learning process**. Well used, they can

- capture, focus, and maintain interest
- highlight a significant concept
- clarify meaning
- guide thinking
- speed up learning
- increase retention
- encourage participation
- add humour

Visuals also add to the **credibility of the instructor** in that they add an element of professionalism to the lesson presentation.

Effect on Retention

While all the points relating to the learning process are important, the most convincing reason for using visual support is the effect it has on the retention of the learner.

Studies on retention confirm what we instinctively feel to be true about the value of visuals.

2. PLANNING FOR USE OF VISUALS

Course designers and instructors must plan the use of visual support for their training sessions. The steps suggested for doing this include the following:

1. Review the lesson objective and teaching points to determine which points should be supported with a visual.

e.g.,

- when a point should be emphasized
- when a point is complex and difficult to explain
- when a point suggests a mental image
- when a verbal description is inadequate

2. Clarify the purpose of the visual.

Is the intent to

- capture, focus, and maintain interest
- highlight a significant concept
- clarify meaning
- guide thinking
- speed up learning
- increase retention
- encourage participation
- add humour?

3. Select the appropriate visual considering the following:

- availability of materials and equipment
- cost effectiveness
- size of group
- characteristics of room
- frequency of use
- variety desired
- effect on learner

4. Design the visual according to criteria for good design.

This last step of designing the visual assumes knowledge of the standards for effective design. Accepting the fact that individual preferences play a part in this design, there are recommended guidelines to assist designers and instructors.

3. PRINCIPLES OF DESIGN FOR VISUALS / TRAINING AIDS

Adhering to the standards for producing good visuals will result in a product which is effective in helping participants learn. All visuals/ training aids should be designed according to the principles of **visibility, simplicity, and clarity**.

1. **Visibility**

Visibility simply refers to whether the visual can be seen. The visibility of a visual is affected by the format, the size of the image and lettering, and the colour combinations used.

2. **Simplicity**

Simplicity refers to how complicated the visual is. The simplicity is affected by the amount and detail of the information presented.

3. **Clarity**

Clarity refers to how intelligible the message on the visual is. Clarity is affected by the arrangement of information, the use of graphics and the use of colour.

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4. CRITERIA FOR VISUALS DESIGN AND DELIVERY

Two aspects of visuals important to both types of visuals are colour and the use of graphic illustrations.

1. COLOUR IN VISUALS

1.1 Findings

Colour is an aspect important to both projected and non-projected visuals. Colour increases the clarity of a message and facilitates the learning process.

The following statements summarize the findings from the research done on the use of colour:

- Colour improves communication.
- Colour attracts and sells.
- The effectiveness of colour increases as people become accustomed to it.
- Colour differentiates between elements.
- Colour highlights vital information.
- Colour shows relationships and makes comparisons easier.
- Colour condenses information, making it possible to present more information without confusion.
- Colour attracts and holds interest.
- Colour adds prestige and reflects credit on its originator.
- Colour appeals to emotions.

1.2 Guidelines for Use of Colour

For the effective use of colour, designers and instructors should follow these guidelines:

1. Use colour for a specific purpose.
2. Be sparing with the number of colours used. (3 to 4 maximum)
3. Convey meaning with intensity of colour.
e.g.,
 - solid areas are more important than patterned areas
 - continuous lines are more important than broken lines
 - heavy lettering and numbers are more important than light
4. Be consistent in the meaning of the variation of colour.
5. Provide contrast to clearly define comparisons and relationships.
6. Identify priority information with colour by writing, circling, boxing, underlining or highlighting.
7. Avoid continuous text in red and green; select black or blue.
8. Choose background colours that are appropriate to the medium and that achieve the desired contrast. (e.g., black on clear, yellow on blue for transparencies; dark colours for computer generated graphics)

2. GRAPHIC ILLUSTRATIONS

Illustrations are valuable to both projected and non-projected visuals because they, like colour, focus attention on what is important. They can be used to clarify understanding, capture interest and add humour.

To be effective, the number of graphic illustrations should be limited; too frequent use decreases the impact and can even serve as a distractor.

5. PROJECTED VISUALS

Projected visuals include all those using projection onto a screen or monitor. They are prepared using a software program, plotters or kroytype lettering equipment, or by hand with transparency markers.

5.1 DESIGN OF PROJECTED VISUALS

The list below outlines the criteria for design.

1. Projected size a minimum of 2.5 centimetres (1 inch) high for every 9 meters (30 feet) of viewing distance
2. Upper case lettering for titles and emphasis; lowercase lettering for text.
3. Material on screen to have margins
(transparencies to have minimum of 1 centimetre/3/8 inch)
4. Material positioned horizontally if possible
5. Material confined to top two-thirds of screen
6. Limit of 6-8 words per line and 6-8 lines per screen
7. Maximum of 8-12 visuals per instruction hour
8. Colour used appropriately
9. Graphics used appropriately
10. Overlay screens to build message

5.2 DELIVERY USING PROJECTED VISUALS

Just as important as the design of the visual is the manner in which the visual equipment is used. To be effective as a support to the learning process, the visuals should be presented with ease. Instructors must be comfortable with the equipment so that the use of the visual is not a distraction to the learners.

Note the following guidelines for delivery using projected visuals:

1. Position equipment to provide unobstructed view and to allow use of space.
2. Check mechanical operation before group assemblies.
3. Arrange visuals in order of presentation.
4. Coordinate projection with presentation.
5. Turn off projection if there is an interval when screen is not required.
6. Avoid bright empty screen.
7. Sit or stand beside projector or stand to side of screen.
8. Maintain eye contact with group, not the screen.
9. Increase volume of voice to compensate for equipment noise.
10. Strip tease with cardboard or paper if you are using transparencies with information you want revealed a little at a time.
11. Add information as you present, using participant expertise whenever possible.
12. Refer to location on the screen whenever appropriate. e.g., at the top right ...
13. Provide copies of screens for reinforcement if required.
14. Allow time for viewing and for taking notes; ensure lighting is available for note-taking.

6. NON-PROJECTED VISUALS

Non-projected visuals include the traditional flipchart, chalkboard/whiteboard, and any other handouts, documents or equipment used to support instruction. These are prepared during the design phase or by the instructor as part of lesson preparation.

6.1 DESIGN OF NON-PROJECTED VISUALS

Keeping in mind the principles of visibility, simplicity and clarity, the following criteria have been identified for the design of visuals on **flipchart/chalkboard/whiteboard**.

The following are the criteria for design of non-projected visuals.

1. Use the largest lettering possible for the material to be presented.
(Minimum height of 1 inch)
2. Use 10-12 lines as a maximum.
3. Include key points only.
4. Use clear, bold, uncrowded lettering.
5. Print or write using lower case for continuous text.
6. Avoid slanted lettering.
7. Manage "white space".
8. Use colour appropriately.
9. Use graphics appropriately.

6.2 DELIVERY USING NON-PROJECTED VISUALS

Whether using those non-projected visuals prepared ahead or using "real time" support (created during the presentation of the lesson), instructors must be at ease using the equipment to be effective presenters.

Note the guidelines for delivery using non-projected visuals.

1. Start with a clean flipchart/board.
2. Keep markers/chalk readily available.
3. Consider covering prepared material until needed.
4. Maintain eye contact.
5. Position yourself to the side of the visual.
6. Avoid covering text with your arm.
7. Speak with sufficient volume, talking to the group.
8. Make notes in light pencil for yourself on flipcharts.
9. Tab flipchart pages for easy reference.
10. Post/or leave on board material to be used for future reference. (Prepare tape in advance.)
11. Where appropriate, use two flipcharts or a combination of board and flipchart in tandem.
12. Practise flipping pages for flipchart, planning to flip forward or backward.
13. Use blank sheets on flipcharts to avoid bleeding of lettering, if necessary.
14. Allow sufficient time for study and note-taking.

7. HANDOUTS DESIGN AND DELIVERY

Handouts are somewhat different from other non-projected visuals in that they are generally prepared as part of the lesson design. In fact, the handouts are often distributed all at once in a Participant Manual.

Should instructors wish to prepare additional handouts for use during training, they should carefully plan their use and recommend that the changes be made to the design so other instructors can take advantage of the improvement in design.

The design of handouts is largely determined by the content to be presented. In designing handouts, consider the following:

1. Adequate use of white space to avoid crowding
2. Opportunity for participants to highlight important information or record own notes
3. Text that is relevant, clear and concise
4. Use of headings and subheadings
5. Consistent lettering and numbering

The instructions for use of handouts are generally provided in the lesson plan. Some general guidelines are listed below.

1. Distribute /make reference to the handout at the appropriate time.
2. Clearly identify by page/ numbering reference/ heading the information to be read. Write numbers of board or flipchart.
3. Wait until participants have found the correct page before speaking.
4. Always provide a purpose for reading to focus learner attention on what is important.
5. Provide adequate time for reading; don't talk to group while they are trying to read.
6. Indicate the amount of time for reading if the text to be read is more than a page.
7. Ask participants to report their findings and build on their answers.
8. Vary the use of handouts. e.g., introduce, develop or summarize teaching points

GIVING EXPLANATIONS

In personalizing a lesson plan, instructors/facilitators plan the implementation of the instructional methods related to the content to be presented. After identifying what these methods are and where the use of visual support is advantageous, the next step for instructors is to identify where they will be required to provide effective explanations.

Most of the instructional methods require that the instructor explain something. For example,

- lecture demands that instructors explain concepts related to lesson content,
- demonstration asks instructors to describe what is being demonstrated,
- discussion expects instructors to clarify discussion points,
- those methods involving practical exercises require explanation of process as well as clarification of content.

No matter the instructional method, instructors are called upon to present information to participants in a way that will enable them to understand the message and incorporate it into their learning experience.

1. EXPLANATIONS AND LECTURE

Lecture is an instructional method that is dependent upon giving effective explanations. The materials commonly use lecture as an instructional method, it is important that instructors are able to provide these explanations.

Lecture is often selected as the method of instruction if time is short, if the group is large or if the audience lacks experience and material. It is also selected in situations where a brief review of material is desirable.

The success of a lecture is dependent upon the ability of the speaker to communicate the message so that the listeners understand what was intended. This means being able to **read the audience response and adapt the presentation** during delivery. The method assumes subject mastery, careful planning, and excellent presentation skills.

1. **TECHNIQUES FOR EFFECTIVE DELIVERY**

There are a number of techniques available to an instructor to ensure that lecture delivery is successful.

These techniques include the following:

1. **present the content in a framework**

A framework aids listeners in relating to the content. It gives listeners a point of reference to which they can link new information.

For example, a framework for introducing a new procedure might be "problem" and "solution". This would allow listeners to see how the new procedure could eliminate the difficulty they were currently experiencing. The framework serves to help learners organize the new information.

Some possible frameworks are:

- * past, present, future
- * problem, solution
- * known, unknown
- * cause, effect
- * whole, part, whole
- * general to specific

2. **relate to previous experience, skills or knowledge**

By building on what listeners know, instructors can provide the links necessary to integrate new information.

For example, the introduction of new law relating to non-resident tax might include a summary of those aspects which remain followed by the specific changes. The reference to what is known allows learners to orient themselves to the learning situation and to see the connection between what they have done in the past and what they will be expected to be able to do in the future.

3. **use structure of introduction, development, and conclusion**

Each part of the structure plays an important role in ensuring the message is conveyed as intended.

- The **introduction** prepares the listener for what is to come. It announces the topic and relates it to the listeners' needs.
- In the **development** of ideas, listeners are guided in their thinking from one point to the next through clear, concise explanation using appropriate examples, links and repetition.
- The **conclusion** synthesizes the information, reminding the listeners of the important points presented.

4. **stimulate and maintain interest**

The instructor can address the level of motivation of participants by:

- using a problem solving approach
- using visual support
- introducing examples, mental pictures
- connecting with listeners through body language (eye contact /movement)
- managing own attitude
- being concise, coherent, and clear
- managing time
- varying pitch and volume of voice
- being well prepared

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2. PREPARATION STEPS

For any segment of training requiring lecture/ explanation instructors can prepare by considering the following steps:

1. Define purpose of explanation.
2. Set objective.
3. Confirm level of expertise of learners.
4. Study location.
5. Decide on time frame. (as short as possible)
6. Determine content.
7. Select framework.
8. Prepare conclusion by
 - summarizing key points
 - linking to real world activity
9. Plan presentation by
 - arranging points in logical order
 - identifying items for visual support
 - determining transitions between points
 - identifying examples to illustrate points
10. Rehearse presentation

EFFECTIVE QUESTIONING

An important aspect of preparing to facilitate a training session is to review the materials for opportunities to use questioning.

Questioning is particularly suited to situations where learners have some expertise or where learners can find the information through the reading of work-related documents or other reference materials.

Questioning, as an instructional method on its own is frequently suggested as the means of developing lesson content in training materials. Questioning, as a technique, is also extremely valuable in combination with other instructional methods.

1. VALUE OF QUESTIONING

1. Stimulates Involvement

Questioning is an effective means of arousing learner interest, guiding learner thinking and encouraging learner participation.

Questioning provides variety and a change of pace for learners; because it stimulates learner involvement, it effectively supports the learning process. Also, by asking questions, instructors offer those learners with expertise an opportunity to share their experience and opinions.

2. Confirms Learning

Through questioning, instructors can determine the knowledge level of the learners.

Questioning is an ideal way to determine both the entry level of participants and the success of the learning experience. Questions can serve as a check on how effective the training has been; they can also assist instructors in identifying problem areas which the session should address.

2. FACTORS AFFECTING SUCCESS OF QUESTIONING

The success of questioning is affected by the intended use of the questions, the questions themselves and the process followed in asking them.

1. Intended Use

How effective questions are in any given situation depends upon what their intention is. Questions can be seen as having the following three uses:

- * **introducing a point**
- * **developing a point**
- * **concluding a point**

Questioning in the introduction and development of a teaching point is appropriate in situations where learners have expertise or have access to reading material where they can find the information required to respond. As new concepts are presented, instructors can use questions to allow learners to apply what they are learning immediately.

Questioning as a concluding activity allows learners the chance to recall what was presented. Asking learners to summarize the important information reinforces significant points .

This variety in the way questions can be used allows designers and instructors scope to combine other instructional methods with questioning.

As instructors personalize their lesson plan, they should examine the existing materials for indications/opportunities to use questions. In considering how the questions affect the introduction, development or summary of the teaching point, instructors will ensure that their use of questions is appropriate to the needs of the learners.

2. Criteria for Question Formulation

To be successful, questions must meet the following criteria:

* **clear, concise, correct**

Word questions so that listeners can understand them easily. Ensure that they

- address only one point at a time
- are free from unknown jargon
- are as short as possible
- are both technically and grammatically correct

* **appropriate level of difficulty**

Determine what the desired level of difficulty for the question is. Questions should require the learners to think; if answers are either too obvious or too difficult, learners may react negatively.

* **relevant**

Ask only questions that are relevant to what the learners should focus on. Avoid insignificant details and questions that are off track.

3. Questioning Process

A third factor affecting the success of questioning is the way an instructor poses a question, listens to the response and reacts to the response given. This process is critical to the successful implementation of questioning.

The process suggested consists of five steps.

1. ASK - ask questions that are clear, concise and relevant; address question to whole group
2. PAUSE - pause to allow listeners time to interpret the question and to formulate an answer (3 to 10 seconds)
3. PICK - pick someone who indicates that he/she wants to respond; direct the question to a specific individual by name
4. LISTEN - listen to the response with the appropriate acknowledgement (eye contact, facial expression, or other minimal encouragers)
5. EVALUATE - evaluate the response and respond appropriately

All responses require acknowledgement. How the instructor handles the acknowledgement of answers is important to the success of the process.

3. DIRECTIONS OF QUESTIONS

Questioning is an effective means of drawing out information and stimulating thinking. Facilitators ask the questions to promote learner involvement and discussion. Participants themselves often pose questions to the facilitator and to other participants.

As the facilitator using question and answer, consider the **direction of questions**. Address your questions to the whole group to promote thinking of all participants. Then select someone to respond to the question and perhaps ask others as well to add to the initial response. These techniques are sometimes labelled **OVERHEAD** and **DIRECT** questions.

Where the participants are asking the questions, have other participants involved in answering rather than providing the answer yourself. Use the **RELAY** (to others) or **REVERSE** the question to the participant who posed the question.

IMPLEMENTING EXERCISES EFFECTIVELY

In personalizing a lesson plan, the instructor/facilitator is striving to ensure that the training will be effective for all participants.

One important part of this preparation is to consider the impact of the learning activities or exercises on the learning process.

1. EXERCISES AND LEARNING

Exercises are essential to the success of learning in that they provide learners with the opportunity to apply new knowledge and skills; this application activity results in increased retention and skill development.

These exercises can also serve as a vehicle to assess progress. Learners and instructors are able to identify the strengths and weaknesses of the performance. The final lesson exercise or performance check is designed both to reinforce and evaluate learning.

2. INDIVIDUAL VS GROUP EXERCISES

Participants may be asked to work individually or in small groups to complete a specific task. The designer may not always indicate which arrangement is to be implemented, so instructors can make this decision based on the nature of the activity in relation to the rest of the lesson.

Instructors/facilitators find that having variety in conducting exercises is effective in stimulating learner thinking and in meeting the specific learning styles. The options include:

- working alone
- working in pairs
- working in small groups
- working in plenary

3. TYPES OF EXERCISES

Good design includes a variety of exercise types which focus on the application of knowledge and/or skills related to the lesson content.

Some of the more common types include:

1. Practice Questions

Participants are asked to complete short answer questions, respond to true/false statements, answer multiple choice questions, match items in lists, arrange items in order, perform calculations etc.

2. Problem Solving

These exercises present a problem for solution. They may involve the use of mathematical or technical skills, or relate to the use of processes or procedures.

3. Case Study/ Situation Analysis

A situation/case is presented to the participants as realistically as possible. Participants are asked to apply knowledge and skills to analyze and propose a solution or a plan of action.

4. Simulation

Participants are asked to perform all or part of the real task as would be expected in the workplace.

5. Role Playing

Participants are given an opportunity to react to a situation by taking on the role of an individual in a specific environment.

4. TECHNIQUES FOR USING EXERCISES

In order for exercises to be an effective tool, participants must

- see the relevance of the exercise
- understand what is expected of them
- complete the assigned activity
- receive feedback on performance

These requirements clearly set out what is expected of instructors/facilitators. They have the responsibility of administering/conducting the activity associated with the exercise so that the participants needs are met.

The techniques for ensuring the success of an exercise include these steps:

1. Provide clear directions and verify that learners understand what is to be done and the time available for the activity.
2. Relate the exercise to the teaching points and provide the rationale for its completion.
3. Monitor the exercise completion and intervene appropriately.
4. Follow up the exercise completion with feedback on performance and a summary of the critical teaching points.

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EXPERIENTIAL LEARNING AS AN APPROACH TO INSTRUCTION

The research on adults as learners supports the common expression, **learning by doing**. In fact, if you think about it, you will probably agree that your most effective and efficient learning experiences are the result of applying what you were learning to a new situation.

As learners, adults are able to benefit from **trying out** behaviours, and through this trial and error activity, discover both what works and what doesn't work.

This approach to learning has been labelled **experiential learning**. Following this model, learners are provided with an opportunity to experience a situation and thus to discover for themselves in a concrete way what the best performance is.

1. THE THEORY OF EXPERIENTIAL LEARNING

Experiential learning is conceived of as a four stage cycle. Learners are seen to have four kinds of adaptive abilities which are used in the learning process.

1. Concrete Experience

Learners have an immediate concrete experience. They involve themselves fully and without bias in this opportunity.

2. Reflective Observation

Learners use the concrete experience as a basis for observation and reflection. They think back to the experience in order to generate observations from as many perspectives as possible.

3. Abstract Conceptualization

Learners analyze these observations to form concepts and generalizations (i.e., come up with ideas that they can integrate and assimilate into logically sound theories.)

4. Active Experimentation

Learners try out their concepts and generalizations in new situations. They test the implications of their "learning" in situations which require new decisions and problem solving.

In the learning process, learners move in varying degrees from action to observation, from analysis to involvement.

Learners often are more skilled one of the abilities (e.g., observation, analysis,) and may have a preference for its use.

Experiential learning theory provides a model for the learning and adaptation processes in which we can see the ways that individual learning styles and corresponding learning environments can be identified.

2. USING EXPERIENTIAL LEARNING IN TRAINING

2.1 Exercises/Learning Activities

The training packages designed for our facilitation often contain learning activities which can be identified as **experiential** in nature.

Exercises in which participants are asked to discover content for themselves are examples of these. Learning activities such as roles plays, case studies or simulation can be used as the concrete experience from which participants make observations, come up with conclusions which they then apply in other activities and on the job.

2.2 Facilitation of Experiential Learning

Instructors/facilitators are called upon to guide this process in the training session.

They are asked to

- set up the context for the concrete experience
- guide the observation and reflection in plenary or in small groups through the use of questions
- encourage the formulation of conclusions
- provide follow up activity to test/apply learning

Questioning technique plays an important role in the facilitation of the experiential approach in the classroom. Facilitators must be highly skilled in

- formulating questions
- listening to respondents answers
- acknowledging responses (including probing and clarifying)

THE GROUP DISCUSSION INSTRUCTIONAL METHODS

In the list of instructional methods, discussion appears in the grouping with question and answer and brainstorming. In fact, the three are instructional methods which expect participants to be involved in the presentation of content and are thus closely related to each other.

Question and answer, as described previously, can be used as an instructional method in combination with other instructional methods. Simply put, participants are asked to respond to questions. These questions can be used to introduce, develop or summarize teaching points. These questions serve to stimulate the learner and confirm learning.

Question and answer becomes **discussion** when participants are encouraged to generate and consider a number of alternatives in response to a particular situation. The situations appropriate to the use of discussion include the following:

- group problem sharing
- sharing of knowledge/experience
- evaluation of solutions to a problem

If specific restrictions are placed on the rules for handling discussion, the instructional method can become what is commonly identified as **brainstorming**. Brainstorming is used to generate as many ideas or options as possible within a specified period of time.

Brainstorming is divided into two activities. The first includes encouraging responses to a problem or a question and recording those responses without any evaluation or discussion on the merits of the answer. The second activity involves a clarification of the ideas presented and an evaluation of them against predetermined criteria.

Both discussion and brainstorming are based on the use of questions as a means of generating the participant input. Guidelines for their implementation are described in more detail below.

1. FACILITATING DISCUSSION

Designers identify discussion to involve learners in the presentation of the content. Even though instructors/facilitators may be subject matter experts, in implementing discussion as a learning activity, their role is truly one of facilitation.

The discussion leader plays a key role in the success of the activity. Critical to good performance are the skills required for applying the questioning process.

The discussion leader is responsible for the following:

1. Being well prepared with up to date knowledge on the subject.
2. Identifying the desired outcome of the discussion.
3. Opening the discussion with appropriate question(s)
4. Encouraging contributions from willing participants, drawing less willing ones in as possible.
5. Refraining from TELLING. Avoiding " being the expert" and imposing views in favour of coordinating the communication process.
6. Acknowledging all responses.
7. Clarifying understanding of messages expressed.
8. Keeping discussion on topic, gently reminding participants of the outcome expected.
9. Encouraging critical listening with respect for differing opinions.
11. Recording main points/conclusions on visual support to track results.
12. Summarizing at appropriate times and moving discussion on to next point as required.

2. FACILITATING BRAINSTORMING

Brainstorming is ideal for situations when you want to encourage creative thinking and avoid being trapped or limited to a few options.

Designers often identify brainstorming as a means to involving participants in the presentation of content, when the participants have some expertise or experience with the content.

Instructors/facilitators find that brainstorming is effective for questions where there is more than one appropriate solution.

Instructors/facilitators find that following these steps result in successful brainstorming activity.

1. Explain the method to participants.
2. Present the problem/question .
3. Set the time limit for the first activity i.e., the generation of ideas.
4. Record all responses allowing for brief clarification of the idea without any comment on the value of the idea.
5. Classify /organize responses according to specified criteria required for acceptance.
6. Relate the information to the problem/question.

3. USING QUESTIONS TO GUIDE DISCUSSION

Instructors/facilitators, as leaders of discussion, are to provide positive guidance throughout the activity to ensure that the outcome is what is expected. This means handling situations which could interfere with the success of the activity with tact.

Rather than statements which could be interpreted as trying to control the situation, consider the use of questions as follows:

1. To call attention to a point...
What is your thinking about XXX ?
2. To encourage consideration for strength of an argument...
How much importance do you think you should place on XXX?
3. To encourage remaining on topic...
Just what point are we considering?
4. To register agreement/disagreement...
To what extent do we agree/disagree on this point?
5. To draw attention to completeness of information...
What information can we add to what is already expressed?
6. To encourage contributions of others...
Can we invite someone who hasn't had a chance to speak?
7. To draw attention to bias...
How is our own interest affecting our views?
8. To encourage cooperation...
Where, between the extremes, does the best course of action lie?

GIVING DEMONSTRATIONS/WALKTHROUGHS

Demonstrations or walkthroughs are an effective instructional method for situations where there is a requirement for performance of physical skills or the performance of a complex task.

The term **demonstration** generally refers to the performance of a task. Learners are watching and listening to a description of the task. The term **walkthrough** is used to denote a step by step presentation of performance where the learners may have the additional involvement of following along with some additional visual support or where the learners are able to perform or discuss the task. Many people refer to the two terms interchangeably.

1. VALUE OF DEMONSTRATION/WALKTHROUGH

Demonstration/walkthrough allows the learner both to see and hear the required performance. The use of the two senses serves to stimulate thinking and to clarify the task to be learned.

The use of demonstration/walkthrough can reduce the time required for instruction in that the visual support for the message illustrates exactly what is expected and provides the learner with a concrete experience.

2. PREPARATIONS FOR DEMONSTRATION/WALKTHROUGH

Instructors/facilitators must be thoroughly prepared for the demonstration/walkthrough activity. This preparation includes

- identifying the objective of the demonstration/walkthrough
- ensuring that the equipment, materials and instructions are conveniently placed
- arranging seating for all to see
- practising the task until you are comfortable with its performance

3. STEPS IN DEMONSTRATION /WALKTHROUGH

As a guide to successful presentation of a demonstration/ walkthrough, consider the following:

1. Introduce the activity, stating its purpose, relating the task to the job performance of the learners, and introducing the materials or tools involved.
2. Demonstrate the task, step by step, slowly enough for participants to observe actions and explaining each step as you perform it.
3. Have participants describe the task as you perform it OR have the participants perform the task following your instructions, noting the result of each action.
4. If appropriate, have participants perform task without your instruction, asking them to describe what they are doing as they perform the task.

Throughout the activity

- use visual support as appropriate
- encourage participants to ask questions to clarify their understanding
- repeat any steps that present difficulty
- observe participants' performance and give constructive, encouraging feedback

IMPLEMENTING ROLE PLAY

Role plays are learning activities in which learners are given the opportunity to act out real life situations. Guidelines are provided to participants so that they can practise the particular skills or techniques which are the focus of attention.

1. BENEFITS OF THE ROLE PLAY

The role play serves to provide learners with a safe opportunity to try out behaviours which they might not otherwise risk in an actual life situation.

Participants gain the experience of having behaved in a specific manner **within the structure of a learning activity** which allows for follow up evaluation, both by self and others.

Using this concrete experience, learners can reflect upon what happened, analyze the effect of the behaviours, identify what was appropriate to the situation and suggest what other alternatives might have been more effective.

In sum, the value of the role play is that it sets up opportunities to discover and practise new behaviours that are required in the performance of job tasks.

2. ROLEPLAYER AND OBSERVER RESPONSIBILITIES

Role plays are structured so that there are roleplayers and observers. Each has an important part to play in ensuring success of the role play learning activity.

2.1 The Role players

Roleplayers are given the responsibility of assuming a given identity, e.g., client/employees/managers and of acting out the roles as assigned so that they reflect as much as possible the **real life** behaviours of the players involved.

They are asked to use their experience with the work world as a basis for their actions. Where their experience is limited, they are asked to behave as they think the players would in the situations given to them.

Generally, some directions are provided for roleplayers. These directions may vary in the amount of detail; in some roleplays, roleplayers are asked to create their own roles.

For example, in one roleplay, a player assigned the role of department employee may be expected to practise and experiment with the skills identified as those requiring training. (Roleplayers are asked to participate as if they were the employee involved). A second player assigned the role of client may be expected to act out the situation as directed in the guidelines and using his/her own experience.

2.2 The Observers

The observers are a critical component of any role play. Their responsibility includes making observations on which they are to report and comment.

During the acting out of the situation, observers are to focus on specific behaviours which are the object of the training in order to provide feedback to the roleplayers and their conclusions about the situations enacted. This feedback can be given in small groups or in plenary session. Often observers are provided with information on the situation and guidelines for observation.

3. MATERIALS REQUIRED

Within the training package, designers provide instructions for the roleplay learning activity. There are usually instructions for the facilitator as well as instructions for the roleplayers and the observers.

These instructions may be in the form of separate handouts or form part of the Participant Manual and the Instructor/Facilitator Lesson Plan.

Instructors/facilitators are well advised to examine the materials carefully to determine in advance of the session how the various documents are to be used. There are a number of types of roleplays for designers to choose from. One course may include more than one type.

There may be varying amounts of structure in the roleplay design. Structured roleplays can include written descriptions of characters and expected behaviours while unstructured roleplays can ask participants to prepare their own situations and develop their own characters.

4. FACTORS AFFECTING SUCCESS OF ROLEPLAY ACTIVITIES

The instructor /facilitator is truly the key to providing the environment for role play success.

- In order for role play to be successful, instructors/ facilitators must ensure that they and the participants are comfortable with the idea that the roleplay can contribute positively to the learning expected of participants.
- The importance of preparation cannot be over emphasized. Instructors/facilitators must be clear on the desired outcome in relation to the teaching points and the skills in question. They must be able to identify how the roleplay activity is put together and what is expected of them in its facilitation.
- Instructors/facilitators are expected to be skilled communicators, knowing when to provide leadership or support and when to avoid intervention.

The facilitation activities can be divided into three areas, setting up a role play, coaching during the roleplay and debriefing the roleplay.

5. SETTING UP A ROLE PLAY

To set up a role play consider the following:

- introduce purpose of role play e.g., to practise a particular skill, to discover options for handling a situation
- provide oral and written directions for its implementation, including time guidelines for preparation, acting out and feedback
- confirm role assignments of roleplayers and observers
- confirm use of materials, including roleplayer descriptions and observer checklists
- confirm use of video, if required
- clarify your role as facilitator of the activity
- remind participants that they are to try to simulate the real world without worrying about acting performance

6. COACHING DURING THE ROLEPLAY

To coach participants during the activity, consider these suggestions:

- circulate to each group during preparation to answer any questions
- assist only as required during roleplay acting
- record observations as you visit each group so that you can use them in the debriefing activity
- intervene as required to ensure feedback session is on track

If you feel the class may have some difficulty in carrying out the roleplay as assigned, use the first one as an example in fishbowl with volunteers acting out the roles in plenary and demonstrating how the feedback session should work through the of questions.

7. DEBRIEFING ROLEPLAYS

The debriefing of the roleplay is as important as the rest of the activity.

If the roleplay is used to introduce the skills to be presented, as is often the case in the experiential approach to communication skills, the debriefing is the place where the points to be made are drawn out from the experience.

If the roleplay is used as a practise activity of lesson content already presented, the debriefing can be seen as the consolidation of the learning.

In both cases, the debriefing is seen as critical to the learning process. Depending on how the designers have planned the debriefing, the feedback to the roleplayers may be provided as part of the small group activity or in plenary following the small group activity.

Consider the following as you prepare the debriefing session:

- highlighting the strengths observed
- finding constructive ways to address the areas in need of improvement
- the best way to summarize the teaching points related to the roleplay activity
- the use of observer reports/roleplayer reports
- the use of video play back

IMPLEMENTING CASE STUDIES AND SIMULATIONS

Case studies and simulations are instructional methods that can serve learners in two ways.

1. They can be used to provide learners with experience from which they can discover new knowledge and develop new skills (i.e., an experiential approach)
2. They can be used to practise the application of knowledge and skills presented in some other way. (i.e., a practise exercise)

What is important is that they are **powerful learning activities** because they expect participants to perform within the context of a work situation.

Case studies present detailed accounts of situations for analysis and action by the learners. **Simulations** try to duplicate situations as they would be found on the job and ask learners to perform as they would on the job.

For example, a case study could present the facts of a situation relating to a audit decision that needs to be made. The simulation would present the information to the learners so that they would receive the facts in the same way as they would at work. (in letters/on financial statements etc.)

1. BENEFITS OF CASE STUDY AND SIMULATION

Since both cases and simulations can be used to represent the thinking required of learners in the workplace, they are seen as valuable learning activities in training sessions.

The learners are given in both an opportunity to face the circumstances of the real world in a safe environment. This allows learners to actually practise the analysis, the decision making, or the behaviours expected of them without fear of the consequences that could result from error.

The most common example is use of the flight simulator by pilots in training - if they crash using the simulator, they can live to learn from their mistakes.

2. THE TRAINING MATERIALS

Instructors/facilitators can expect that the training package will include for these learning activities the following:

1. materials for participants
 - description of situation
 - instructions
 - case information/data
 - suggested solutions
2. materials for instructors
 - directions for introduction, coaching, take up and conclusion activities
 - additional background information
 - suggested solutions

3. PREPARING FOR CASE STUDIES/SIMULATION ACTIVITIES

In order to facilitate the learning activity, because the set up may be fairly complex, instructors/facilitators are expected to be well prepared.

The suggested preparation steps include the following:

- work through exercise
- identify potential problems
- personalize the directions for introducing, coaching, take up and concluding activities
- prepare visual support
- organize materials

4. IMPLEMENTING THE CASE STUDY/SIMULATION

The training materials generally include specific directions for the activity as it is designed. It is important that these directions are carried out as prepared so that the learners are able to achieve the desired result. Instructors/facilitators are called upon in their facilitation of the activity to meet criteria for effective instruction e.g., using explanations, questions, providing feedback as required throughout.

USING VIDEO MATERIALS

Training packages can be designed so that the use of video taped material plays an important role in the training sessions. Some sessions, in fact, are built around the use of specific film or video materials.

Both professionally produced material and in-house productions are found in our current training materials. Used appropriately, film can be a very effective mode of presentation.

1. POSSIBLE USE FOR VIDEO MATERIAL

The video material is included in training packages to

- introduce information
- develop ideas
- summarize material
- provide feedback on performance

A very common use of video is to film activity during the training session itself. This videotape can be used a number of different ways by the learners both during and after the training sessions.

2. PREPARING TO USE VIDEO MATERIAL EFFECTIVELY

To prepare to video/film activities the following preparations steps are suggested:

- identify purpose of video activity
- preview video, noting highlights
- prepare to introduce video activity
- prepare to use segments for replay, if appropriate
- prepare follow up activity (discussion, exercise) referring to specific examples where possible
- review print materials to see relationship to video
- set up equipment in advance
- check counter if you plan to use segments(prepare cue cards)
- arrange seating for viewing

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3. INSTRUCTING USING VIDEO

Instructors/facilitators are asked to follow these guidelines in using video materials:

- set context for video
- provide reason for watching/ focus attention of audience
- ask questions on video to promote discussion/stimulate thinking
- include follow up to watching video to highlight important points
- stop video/pause if necessary
- vary follow up activities if using several segments
- replay segments to reinforce points
- keep lights on
- allow movement to see monitor
- encourage notetaking
- summarize points, relating to the job of trainees

CONCLUDING SESSIONS

The last task expected of an instructor/facilitator during a training session is to conclude the training segment. As with most conclusions, this activity is important in that it helps learners in making the link between what has occurred during the session and what is to follow.

For any training session, conclusions are required for each segment of training, that is, each lesson and each course/workshop/module.

1. PURPOSE OF COURSE/ LESSON CONCLUSION

The conclusion is the part of the training session that assists learners in reflecting back on what they have learned.

Through a summary activity, the conclusion serves to help the learner integrate the new learning with the old and to make the link to what is to follow.

In addition to being a consolidating event, the conclusion provides the opportunity for learners to assess the change resulting from the learning activities, the change evidenced by the acquisition of knowledge and skills. By offering the learner with a chance to self evaluate learning success, learners are able to establish for themselves, a new threshold from which they can work to further improvement.

2. DELIVERY OF CONCLUSION

Instructors/facilitators are advised to manage their time so that the conclusion of any lesson/course/workshop/module is not squeezed out.

The story must have an ending; if not, the learners are left at sea, trying to scramble into the lifeboat without the support of the group of participants who shared their learning experience.

The length of the concluding segment is often appropriately short, and more often than not, shorter than originally designed. No matter the length, an effective conclusion to any segment of training includes

- some summary of content/experience
- reference to the course/lesson objective
- some evaluation of the learning success
- link to the future related to the training session

CO INSTRUCTION

Many courses can be delivered with two instructors. There can be real benefits to learners and to instructors if these instructors work well together. In order to be successful as a team, instructors must take some time prior to course delivery to determine how their roles can compliment one another.

Instructors planning to co-instruct should discuss what their expectations of their co-instructor are and work out a plan that they both can be comfortable with.

1. ADVANTAGES OF CO-INSTRUCTION

The following benefits of co-instruction have been identified:

- co-instructors can compliment each other's styles to facilitate increased learning by course participants
- co-instructors can divide the responsibilities, making it possible to manage challenging situations with less stress
- co-instruction offers opportunity for the personal growth and development of instructors
- co-instruction can generate a synergistic effect, i.e., the sum is greater than its parts
- co-instruction offers learners a variety in approach (serves as stimulation and allows learners to see two perspectives)

2. POTENTIAL DISADVANTAGES

Although there are real benefits to instructors working as a team, there are also some potential disadvantages that should be considered. They include the following:

- a poor relationship between instructors can interfere with learning i.e., if there is tension, mistrust, or competition, the focus of learners may be on the relationship rather than what is to learned
- opposing goals and ideas may cause confusion

3. AVOIDING THE DISADVANTAGES

To avoid the disadvantages of co-instruction, co-facilitators are encouraged to

- share orientations and experiences to develop a positive rapport
- solicit feedback frequently and regularly
- control number of interventions
- assess needs of participants
- plan activities carefully
- check all assumptions

4. EFFECTIVE CO-INSTRUCTION

For co-instruction to be effective, the following must be considered:

- it demonstrates mutual responsibility while having respect for individual differences
- the instructors' behaviour shows that, although differences exist, there is appreciation for the other point of view
- the instructor roles and tasks are clearly defined
- it requires team-building activity (planning, rehearsing, and developing of a positive working relationship)

5. CO-FACILITATING WORKSHEET

The following pages contain a sample of a tool designed for use by instructors/facilitators who would like to begin a process for working positively together.

It is made of the following four sections:

- A. Pre Interview Inventory - to be completed individually
- B. Initial Interview - guidelines for the first meeting between the instructors
- C. Post Session/Lesson Interview - guidelines for discussion post session/lesson
- D. Post Course Interview - guidelines for discussion post course.

CO-FACILITATING WORKSHEET

A. PRE - INTERVIEW INVENTORY

1. I believe that people learn best when...
2. I like training because...
3. I take these actions in the following situations ..
 - a. starting a course
 - b. participant talks too much
 - c. participant is silent
 - d. participant arrives late
 - e. conflict / disagreement between participants
 - f. participant brings up irrelevant information
 - g. course content is challenged
 - h. participant is physically/ verbally abusive
 - i. humour is inappropriate
 - j. participant cries
4. My presentation style is generally
 - a. fast-----slow
 - b. directive-----non directive
 - c. formal-----informal
5. The thing that makes me most uncomfortable as an instructor is...

B. INITIAL INTERVIEW

1. Share results of completed Pre-Interview Inventory, explaining items to clarify understanding.
2. Describe your experiences as a course participant.(e.g., best, worst, most interesting)
3. Describe your experiences as an instructor.(e.g., best, worst, most challenging)
4. Identify any issues of concern to you arising from any past experience as a co-instructor.
5. Develop together your goals as an instructing team.
6. Identify some specific behaviours for your co-instruction sessions, considering the following:
 - a. where you will be sitting
 - b. who say the first/last word
 - c. who will handle unexpected matters of administration
 - d. who is responsible for "running" each session
 - e. whether or not there are times when you will leave the group
 - f. how to handle small/ individual activities
 - g. how to call on the other/ intervene during a session
 - h. planned vs spontaneous intervention
 - i. what is non-negotiable with each person
 - j. dealing with issues - where, when, how
 - k. whether to encourage/ discourage differences of opinion
7. Determine responsibilities for administration and delivery.
8. Identify something you will be trying to improve.
9. Agree to meet after session to discuss co-instruction successes/difficulties.

C. POST SESSION/LESSON INTERVIEW

1. Discuss overall reaction to co-instructing experience.
2. Discuss success of learning experience for participants.
3. Solicit feedback on the following:
 - What was effective?
 - What was ineffective?
 - What are our recommendations?
 - What feelings do we have?
4. Renegotiate any changes about previous agreements.

D. POST COURSE INTERVIEW

1. Discuss extent of achievement of goals.
2. Discuss what you learned from experience.
3. Solicit ideas about improving competence.

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MANAGING GROUP DYNAMICS FOR LEARNING

Since training classrooms are made up of unique individuals, each with their own personality, background, values, and learning styles, managing the group dynamics to create a learning environment to meet the needs of every learner is no easy task. Yet instructors/facilitators are expected to facilitate the learning of participants so that they achieve the training objective(s) and transfer their learning to their job.

1. UNDERSTANDING GROUP BEHAVIOUR

Instructors/facilitators are tasked with working with groups. Since group behaviour patterns affect the way individuals within the group perform, it is important for those tasked with leading the group to take into account those factors about group behaviour that are predictable.

1.1 Stages of group development

Groups change and develop over time as the group members adjust their feelings and behaviour toward one another. Instructors/facilitators who can predict the stages the group is likely to go through can allow for these stages and actually take advantage of them.

There are three distinct stages that can be identified for groups in training. They are the following:

1. FORMAL STAGE
2. INFORMAL STAGE
3. SELF MANAGING STAGE

Each of these stages is characterized by typical behaviours of the group members. They are listed in the chart which follows.

FORMAL STAGE	INFORMAL STAGE	SELF MANAGING STAGE
<ul style="list-style-type: none"> • address each other formally • are unusually quiet • obey rules set • keep same seat • accept and desire authority from session leader 	<ul style="list-style-type: none"> • drop some formal rules and behaviours • relate more closely with each other • accept group member as informal leader • show feelings and attitudes more easily 	<ul style="list-style-type: none"> • know and accept each other • can talk about having common goals • can assign tasks on basis of strengths • tolerate deviant and eccentric behaviour • break comfortably into subgroups without jealousy

In the formal stage, group members generally are feeling insecure, anxious and uncertain about other group members. Hence they tend to do what will make the situation more predictable in order to reduce their uncertainty. Most people do this unconsciously.

There is no fixed time to the length of time a group will spend in this first stage. It seems to depend on how much time they have to spend together. A group on a one day course may spend only half an hour in the formal stage.

The group may progress to the informal stage without all its members being ready; those that are not ready can feel left behind.

There is progress to the self managing stage when group members have lost a great deal of the insecurity which they experienced at the beginning of the group. Only at this stage is it sensible to talk about the group members having common goals and being able to put group needs above individual needs.

1.2 Implications for instructors/facilitators

Some of things that instructors/facilitators should consider include:

- accepting the need for a formal stage where group members can become more comfortable
- arranging an ice breaker to encourage progress towards less formality
- adopting role of facilitator of the learning as the group becomes more relaxed rather than trying to maintain control and a posture of authority

2. ROLE OF INSTRUCTOR/FACILITATOR AS GROUP LEADER

Instructors/facilitators can consider themselves as group leaders in the classroom. They must be able to

- establish and maintain a climate of mutual respect and teamwork
- facilitate the learning activities
- serve as a source of information
- manage the physical conditions

2.1 Establish and maintain climate of mutual respect and teamwork

• Mutual Respect

The most important thing a leader can do is to try to see each participant as an individual worthy of respect. Adopting an **assertive** communication style, i.e., having respect for others and yourself, will set up a positive climate for learning. A climate of mutual respect will be established if the instructor ensures that:

- the rights of each individual are accepted
- knowledge and skills are recognized and acknowledged
- individual differences are expected and accepted
- there is no loss of self esteem.

It is through the group leader's efforts to develop a positive working relationship with participants that unnecessary conflicts and frustrations can be avoided. If participants feel that the leader is genuinely interested in them and in their success in learning, they will respond appropriately to his/her efforts.

Ideal conditions are set when a positive, non-threatening atmosphere is created where the leader shows assertiveness while respecting the different needs, styles and preferences of the learners.

• Climate for Teamwork

A climate for team work can be established if both participants and leader understand their respective roles in the learning process, i.e., that learners have the responsibility to learn and the instructor/facilitator the responsibility to guide and to help the learner to learn. Both need to be relaxed, enthusiastic, open and supportive of each other.

2.2 Facilitate the learning activities

How participants perceive the instructor/facilitator is an important aspect to consider in the positive management of the learning environment. To be perceived positively, instructors/facilitators must show interest in their subject and believe in its importance.

It is critical to be **well prepared** for lesson delivery. Being confident of the course content allows the instructor/facilitator to focus on the learning process of the participants and to maintain a positive rapport with them.

Other features instructors/facilitators should consider are:

- attitude: an honest, pleasant, patient and confident attitude
- voice: a natural voice with appropriate pace, volume and articulation
- appearance: appropriate, business-like dress
- body language: a good posture with natural movements and gestures; eye contact with all the participants; reading participant facial expressions to detect confusion, boredom, willingness to participate etc.

2.3 Serve as a source of information

Participants, in their quest for learning have many sources of information. They will use the course material, any job related documents, other participants and the instructor/facilitator as a means of getting information. Well prepared instructors/facilitators are necessary to make the learning situation as ideal as possible for the participants.

2.4 Manage the physical conditions

When participants enter a classroom, their first impression should be positive. The participants' physical comfort is important to this first impression. Not all of the following factors are always within the control of the instructors/facilitators; however, careful attention to those that are will help to promote those positive feelings.

2.4.1 Guidelines for physical factors

Seating: should be comfortable, with enough spacing to provide ease of movement and visibility of technical and visual aids. Seating should also be arranged to provide maximum interaction between participants and the instructor and amongst participants themselves.

Lighting: classrooms should be as bright as possible but without glare. Lights can be dimmed but not turned off completely for overhead projectors, films or videos;

Noise: if possible, try to eliminate any source of irritant noise.

Temperature: while room temperature is often not controlled by the instructor, it would be prudent to advise participants to wear clothing in layers so that they can adjust to be comfortable.

Quality of material: The quality of the training material (including handouts, transparencies and flip charts) reflects on the instructors' professionalism and genuine interest in facilitating the participants' learning.

Supplies: ensure that enough supplies are available for the number of participants for both instruction and exercise/test activities.

Timing: set appropriate times for breaks, pauses and lunch periods. While instructors must be punctual, they should use breaks to their advantage, such as ending a lengthy discussion, reacting to a tired audience, changing pace, re-arranging the sequence of presentation, discussing an issue with a difficult participant.

2.4.2 Seating arrangements for groups

Seating arrangements can affect group behaviour. Consider the following:

- the most centrally situated individual is likely to emerge as group leader
- the maximum number of communications are made between individuals seated opposite one another i.e., communications tend to flow across the table

Shy retiring participants can be seated to encourage them to contribute and talkative ones can be seated to limit theirs.

The seating arrangement selected will be subject to room size, the furniture available, the number of participants and the desired communication patterns. The choices include:

1. Theatre Style
2. Board Style
3. U or V shape
4. Circle

Those styles where participants are facing one another encourage communication.

3. DEALING WITH CHALLENGING SITUATIONS: Applying a Responding Model

In spite of your best efforts to establish and maintain a positive classroom atmosphere in order **prevent** difficult situations, you may still encounter difficult participants or unexpected situations. As instructors/facilitators, the temptation to become defensive is always there.

It is important to deal with the problems as they arise using a rational problem solving approach. Once you are satisfied that every possible effort has been made to **prevent** disruptive behaviours and to create a positive learning atmosphere, the options left, should problems occur, are to **endure** or to try to **correct** the situation.

In order to decide the best course of action given a challenging situation, consider the following responding model.

3.1 Step One: Assess the situation

In the first step, instructors/facilitators assess the challenging situation by asking themselves **two** key questions:

1. What is happening?
2. Why is it happening?

To answer the first question, it is necessary to acknowledge the discrepancy between the behaviour of a participant or group of participants and the behaviour expected.

After identifying what is happening in the classroom, the source of the problem must also be identified. If the source of the problem is not immediately apparent, instructors/facilitators need to try to determine what the cause might be by observing the group and by considering if the problem might be related to what the instructor is doing, the participant or the environment.

- If instructors/facilitators think the source of the challenging situation / problem is themselves, they might consider the following questions:
 - Is my pace appropriate?
 - Am I being concise?
 - Have I given instructions clearly?
 - Am I using introductions, transitions and summaries correctly?
 - Am I asking appropriate questions?
 - Am I using appropriate movement, gestures, eye contact?
 - Am I attentive to the participants' body language?

- If instructors think the source of the challenging situation / problem is one or more participants, they might ask:

- Could the participant have a personal problem?
- Does the participant have a seeing / hearing / learning impairment?
- Do others share participant's problem?
- Is there conflict between individual participants? group of participants?
- Do the participant(s) want to be in class? or understand the relevance and benefit of the training?
- Are the participants under/overskilled?
- Does the participant have content expertise?
- Does prior experience contribute or detract?

- If instructors think the source of the problem is the environment, they might ask:

- Is the room too noisy?
- Is the temperature of the room comfortable?
- Do all participants have the necessary materials?
- Is all equipment working properly?
- Are outside interruptions being controlled?

The answers to these questions may lead to the expression of a **need**. Once this need is recognized, the value (strengths) that individuals bring to the learning activity or to the group should also be identified. Instructors should examine each situation and individual to see what positive aspects could contribute to the solution of the problem.

3.2 Step Two: Select a strategy of response

In the second step of the responding model, instructors select one of the following strategies:

1. Ignore the situation entirely

This strategy should be used when the learning environment of the class is not jeopardised by the situation. For example, this strategy could apply if a participant quietly walks out of the room and returns shortly after.

2. Ignore the situation in class and acknowledge later

This strategy should be used when the situation is hindering one participant's ability to learn, but is not interfering with the overall learning of the class. For example, this strategy could apply if one participant is not involved with the class activity, or is not paying attention.

3. Acknowledge the situation in class and continue as planned

This strategy should be used when the learning environment of the entire class is in jeopardy. You can choose to speak to one or more participants later. This strategy could apply if participants are tired because it is late in the day, or two participants are talking on the side and distracting the rest of the class.

4. Acknowledge the situation in class and engage the participants by adapting the activity to suit the class

This strategy should be used when a simple acknowledgement is not sufficient and adapting the activity will improve the learning environment of the class. You can engage the participants in an informal exchange of opinions, a formal problem solving session, or additional probing questions.

This strategy could apply, for example, if the instructor introduces a new activity and the participants express resistance, or they are confused, or one participant challenges the content being presented, or the pace of instruction is too fast or too slow.

When responding to any challenging situation, instructors/facilitators should follow these simple guidelines:

- Be respectful.
- Avoid power struggles.
- Avoid embarrassing anyone
- Avoid sarcasm.
- Be professional and considerate.

3.3 Step Three: Evaluate your effectiveness

Finally, instructors/facilitators can evaluate the effectiveness of their response by observing the class behaviour.

If the entire class was involved in the situation, ask direct questions in class to assess success in dealing with the situation. On the other hand, if the situation was caused by a single participant, approach the participant on his/her own.

COACHING IN THE CLASSROOM

One of the tasks expected of facilitators of learning in training sessions is the task of coaching participants as they complete the exercises or learning activities.

1. DEFINITION OF COACHING

Coaching in the classroom is defined as supporting learners by providing the necessary feedback and guidance to enable the learners to complete the tasks assigned to them throughout the training session.

The coaching task may be assumed by the instructor/facilitator or by other participants. In either case, the individual providing the assistance is labelled the coach.

2. ROLE OF COACH

To succeed in coaching, the coach must be focused on the learner needs. The role of the coach can be summarized in two statements.

1. The coach is responsible for supporting the learning process.

This means providing, as required, the context, digestible chunks, practise, stimulation, clarity for the learners.

2. The coach is responsible for establishing a positive climate.

This is the result of developing a rapport with the learner and setting up a situation of mutual respect.

3. COACHING PROCEDURE

The following steps have been identified for an effective coaching procedure:

1. assess performance of learner
2. identify specific areas as target for coaching (digestible chunks)
3. select strategies
 - questions
 - explanation
 - walkthrough example/demo/ hands on practise
4. implement strategies
5. confirm learning
6. summarize the important points
7. follow up learner progress

4. GUIDELINES FOR COACHING

Within the procedure for coaching, there are a number of guidelines that effective coaches follow. These guidelines are listed below:

- acknowledge correct performance
- clarify expected performance
- work from known to unknown/use links
- keep language simple and direct
- confirm understanding of jargon
- avoid expressions which arouse emotion
- use visual support
- use questions
- introduce, develop, and summarize
- provide opportunity for practise
- provide feedback on performance
- adjust to needs of learners

5. GUIDELINES FOR PROVIDING CONSTRUCTIVE FEEDBACK ON PERFORMANCE

Coaches are put into situations where they are giving constructive feedback to others on performance. Throughout the training session, instructors/facilitators can see their important coaching role as their participants are involved in the practise/exercise learning activities.

Constructive feedback includes both positive and negative information skilfully given so that the recipient is able to use the feedback to maintain and improve performance.

The guidelines for giving constructive feedback include the following:

- set up the expectation that feedback is to be given and ensure participants are comfortable with the idea of listening to the opinions of others
- try to provide feedback immediately after performance
- allow for participant self evaluation
- encourage participants to suggest what they might do differently and to ask questions
- select priority areas
- include both positive and negative information
- begin with something positive about the performance
- be clear and specific in the description of performance
- support any evaluative comments
- identify what the individual could do differently by making positive suggestions
- summarize by highlighting strengths and indicating briefly the areas where you are making recommendations for change /having participant describe what changes they would like to work on

HANDLING SENSITIVE TOPICS

As you are probably aware, instructors/facilitators must both be technically competent and possess **effective people skills**, the ability to get along with others. This is especially important when you are the facilitator of a group of participants with a variety of needs working towards a common goal.

As facilitators of learning, you may find yourselves in situations where you are handling sensitive topics. This means being sensitive to the unspoken needs of others. This is always important, but perhaps more so, when the training deals with communication skills, for people often pride themselves on their ability to communicate, and receiving feedback on their performance is a sensitive issue for them.

It is important facilitators possess the people skills necessary to guide groups through the learning process without interpersonal conflict. The key to success in this area is **mutual respect**. Keeping in mind that you are facilitating a group of adult participants who may be your colleagues, and that you will be working with them back in the office once the training session is over, establishing and maintaining respect is more important than ever.

Developing a positive rapport with your participants and establishing a good learning environment is vital to the learning process whenever sensitive issues may arise.

The following is a check list of recommendations to assist you in setting up such a climate.

1. Prepare content to aid confidence

The more time you devote to the preparation of a lesson, the more confidence you will feel in front of the class. This feeling will be transmitted to your participants and it will give them a sense of confidence in you and your abilities as a facilitator to handle sensitive issues.

2. Anticipate potential problem areas

When dealing with sensitive topics such as diversity and anger, be aware of the potential for problems. When participants feel that their value systems are being challenged, they may become overly sensitive. Prepare yourself by anticipating what the sensitive items might be so that you can respond appropriately.

3. **Avoid judgements**

In dealing with sensitive topics, it is important to allow discussion to let people vent their frustrations and concerns. During this discussion, it is vital that you remain non judgemental. Encourage both the freedom of expression and establish the expectation that others listen to differing points of view.

4. **Establish climate of mutual respect**

If we treat our participants with respect, then we are more apt to receive it in return. As the team leader during the training session, you have certain responsibilities in providing the example of accepting participants and respecting their individual needs.

To assist in establishing the climate of mutual respect,

- avoid trying to control others

- e.g., allow participants to leave the room when they feel it is necessary

- accept challenges to the material or to the process

- avoid embarrassing situations

- e.g., ask that you be notified if anyone is unable to stay for the entire course or if anyone has to leave early

- do not centre anyone out if they come in late

5. **Remind participants about guidelines to interaction**

How you interact with the participants and how they interact with each other affects the learning environment. It is important, that in dealing with sensitive topics, that the following guidelines are considered:

- there is respect for the feelings of others.

- participants are open to the views of others

- the classroom is a safe place in which to express opinions

- e.g., refrain from judging responses during brainstorming activities

- encourage participants to experiment with techniques they may not feel comfortable with

- the norm of privacy is respected

6. Avoid trying to change the values of participants

It is not the intention of training to alter the values participants. Training is intended, however, to improve performance so that the behaviour required to meet the objectives of job tasks is possible. Since training is focused on behaviour, guard against attacking values and instead focus on the expected behaviour.

7. Focus on specific objective

During the training session, it is often all too easy to get off topic. This is true especially where feelings are concerned and everyone has a story and considers expressing themselves important. Allow as much discussion as time permits, but keep it focused on the issues. Keeping focused on the specific and the objective will help to achieve what is desired and to avoid side tracks which might be sensitive for individuals.

8. Deal with conflict objectively

When dealing with sensitive issues there is always the possibility of conflict. It is important to keep things in perspective and not to take criticisms and contradictions personally. View each conflict objectively by analyzing the situation, trying to understand where the participant is coming from, and by putting the onus on the participant to explain their concerns.

9. Encourage expression of opinion

Whenever appropriate, encourage expression of opinion from those are willing to share their ideas. By discussing issues and allowing for individual expression, the participants are able to hear differing viewpoints on sensitive topics.

10. Avoid defensive behaviour

It is a natural response to be defensive when it comes to dealing with sensitive issues.

Reflect upon the following statement as it relates to avoiding defensive behaviours.

All behaviours reflect feelings but not all feelings will be reflected in behaviour.



PREPARATION: PERSONALIZING A LESSON PLAN

As part of their preparation for instruction, instructors/ facilitators are asked to personalize their lesson plans. The result of personalizing a lesson plan is an instructor/facilitator who is clear on what the process of instruction for their material is and who is comfortable with implementing the learning activities.

1. STEPS IN PERSONALIZING A LESSON PLAN

The steps for personalizing your lesson plan can be summarized as follows:

1. relate the material to be presented to the overall course objective and the individual lesson objective

In order to be able to do this, you will want to read the entire course so that you are aware of the content and its sequence of teaching points. Some instructors/facilitators find it useful to make a detailed outline of the content if the lesson materials do not provide one.

2. identify the course and lesson structure

Determine how the materials are structured into segments or parts, i.e., what each course/module and lesson contain for the introduction, the body, the performance check/final exercise and conclusion.

3. determine how the lesson design tries to meet the needs of learners in the learning process

Relate the methods and exercises as described to what is expected of the learners so that you have a clear picture of how the learning expected of participants is addressed.

4. identify the instructional methods and the details of delivery provided

Note particularly what the participants are doing and what you as a facilitator of the learning process are expected to do.

For each teaching point,

- note the key points and the key learning activities
- read the reference material
- highlight key words, noting examples and questions and checking or adding references
- confirm estimated time for each point or activity

5. plan the use of visual support

Note what is suggested for the use of visuals, adding others as necessary and ensure

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that you have the necessary supplies and equipment. Prepare visuals as necessary.

6. identify where instructor explanation is required

Prepare your explanations, adding any additional examples and anticipating what questions might be asked.

7. plan the use of questioning

Identify where questions are suggested and any additional places you feel questions are suitable, anticipating what the responses from your participants might be.

8. determine the role of exercises and plan the instructor activity related to them

Prepare to introduce, to coach and to follow up the exercises, noting what is important for each one.

2. ADAPTING TO LEARNER NEEDS

Even though the materials have been designed to meet specifically identified needs, it may be that the group you are working with will require more/less background information, examples or practise than the lesson plan suggests. As facilitators of the learning process, it is important that you are flexible enough to try to meet their needs.

2.1 Ways to Adapt

Generally, your training package should be appropriate to most groups; however, if the group lacks the experience necessary to cope with the learning activities as designed, or if they have more experience than the typical target population or if they have some other need because of the work environment, you will want to adapt to the needs identified by

- adding examples, questions, visuals etc.
- including additional content required to help participants achieve their objective
- increasing /decreasing the time to cover a particular point
- substituting an appropriate method

2.2 Managing Time

The issue of managing time is one of concern to new instructors/facilitators. The suggested times are to be used as guidelines. As you adapt to the needs of your group, your group, you are to adjust the times to the time available.

It is important to remember that learners learn by doing; if time is running short, it is the explanation time that should be reduced, not the time for exercises which provide the learning experience. Avoid cutting out the opportunities to apply what is being learned. If time is a problem, determine what the least important content is and remove that from your presentation or find another way of having participants deal with it later on the job.

OVERCOMING PRESENTATION ANXIETY

It is well known that public speaking is one of life's greatest fears. Overcoming the symptoms that this fear can impose on you as instructors/facilitators of learning important to the success of the sessions you conduct.

Some of the symptoms you may experience include palpating heart, sweaty palms, dry throat, shaking and inability to think or to be fluent in speech.

As you gain more experience, you will have increased confidence and these symptoms will diminish. In the meantime, there are some tips that will help you manage the stress associated with being in front of a group. They include the following:

1. Be well prepared.

Preparation is the key to reducing the anxiety you feel. Include rehearsal and visualization as part of your preparation activity.

2. Breath deeply.

Inhale slowly filling your lungs and exhale completely, lowering your shoulders.

3. Use movement to release extra energy.

Plan to move normally, using the space available to you, and making use of visual equipment.

4. Use technique of tensing and relaxing.

Select a muscle group and in turn tense and relax e.g., clench you fist and unclench it (out of sight of your learners!)

5. Arrange to have a glass of water handy.

Drinking water serves to distract you and moistens a dry mouth.

6. Focus on the reason for your being in front of the audience.

Concentrate on getting the message across and on helping your learners understand the content of what you are saying. Draw attention away from yourself by using the expertise of others and the materials prepared.

7. Establish a rapport with each member of your group.

Greet individuals as they enter; see them as individuals; maintain eye contact with each one.

8. Smile. Enjoy the experience.

Demonstrate your enthusiasm for instructing and facilitation and no matter what occurs, try to maintain a positive approach.

HANDLING ADMINISTRATION OF SESSIONS

The handling of the administration of training will vary according to the local procedures in place. It may be that in some offices, the training coordinator assumes the responsibility for the administrative issues.

Instructors/facilitators are wise to check into what is being done to determine if they are to play a role in the administrative activities.

1. ESSENTIAL ADMINISTRATION ACTIVITIES

The following list identifies some activities that are necessary for successful facilitation of training sessions.

1. Pre-session contact with participants

Participants need the information about the location, date and time of the training session. In addition, for some sessions, it may be necessary that participants prepare in some way for their attendance.

Many instructors/facilitators find it useful to make personal contact with their participants as a way of building rapport and preparing the learner for the session to follow.

If there are circumstances that might affect a learner's participation (e.g., hearing loss, need for a wheel chair), instructors/facilitators are best not to have this information as a surprise the first morning of the session.

It is recommended that the pre-session contact be planned to meet the local requirements.

2. Ordering Materials

The training packages are designed and printed for local use by the Training and Development Organization. The ordering of materials must be done in advance so that the materials can be shipped for the appropriate offering date.

Ensure that the orders clearly identify the materials required so that you can implement the training without difficulty.

3. Arranging training facilities

Since the physical environment affects the learning outcome, it is important that the training facilities will meet the course/workshop/module requirements.

In arranging/confirming these facilities, instructors/facilitators are advised to consider

- the booking of rooms
- the set up of furniture
- the equipment

4. Participant Evaluation/Reaction

Instructors/facilitators find that collecting written feedback from participants valuable in helping them to assess their own performance as facilitators of the learning process and the learning activities as they are designed. Often participants perceive things very differently from those who are tasked with delivering the training.

The collection of written feedback may, in fact, be part of the training packages assigned. If not, you may wish to use the Evaluation of Instruction Questionnaire (EIQ) prepared for general use.

5. Post session contact with participants

Post session contact with participants may be necessary or desirable. This contact can be arranged either formally or informally, as appropriate.

2. SUPPORT AND COACHING FOR INSTRUCTORS

For courses designed by the Training and Development Organization and delivered by local instructors/facilitators, the Training and Development Organization (TDO) is preparing to offer support to those involved in implementation.

Depending on the situation, individuals from the TDO with expertise in the content and the process of delivery are to be identified to serve as a resource to the field. These training personnel may be available to provide on site coaching, to answer questions, and to provide consultation as required.

As part of the goal of maintaining the quality of the training package and to ensure it continues to meet the changing needs of participants, the Training and Development Directorate is involved in visiting local training sessions to gather input on the current course design. This follow up support activity includes gathering the reaction from the course facilitators as well as from the participants.

CONTINUOUS IMPROVEMENT THROUGH SELF ASSESSMENT

1. CONTINUOUS IMPROVEMENT

As members of a continuous learning organization, you are expected to be able to improve job performance and the quality of service through the use of self assessment.

As instructors/facilitators of sessions involving the learning of others, your self assessment activity is to reflect upon the sessions you conduct to identify what went well and to identify what things you might be able to improve upon.

2. SELF ASSESSMENT TOOL

The SELF ASSESSMENT TOOL FOR INSTRUCTORS/FACILITATORS has been prepared to assist you in this activity. It appears on the following pages.

In assessing yourself on the items listed you will be reflecting upon your perception of your performance as an instructor/facilitator and will be able, as a result of this reflection, to identify areas on which you would like to focus your attention.

Follow the instructions provided to make the best use of the tool. It is recommended that you take the opportunity to assess yourself after each session you facilitate.

3. REACHING YOUR GOAL

You will find that using the tool will make it possible to come up with an action plan to help you move towards a higher level of competency.

Improving skills in facilitating the learning of others should result in benefits to the instructors/facilitators as well as to their learners, and ultimately to the clients we serve.

INSTRUCTOR/FACILITATOR SELF-ASSESSMENT TOOL

INTRODUCTION

This tool is designed to help you self-assess your performance throughout the session you just facilitated. The results of this assessment are for your own use only. It is suggested that you fill out this tool after each session. Comparing your answers after several sessions will help you to identify your strengths and give you the rationale to initiate the necessary steps to enhance your competencies as an instructor/facilitator.

GENERAL INFORMATION

Course Title: _____

Date: _____

Number of participants: _____

Check the box that corresponds to your self-assessment.

PART 1 : LEARNING CLIMATE

A. Setting the climate

1. I introduced myself. Yes No N/A
2. I gave the opportunity to everyone to introduce themselves. Yes No N/A
3. I covered the administrative details (washrooms, cafeteria, security). Yes No N/A

4. I prepared the learners for the session by completing the necessary introductions (course objective, course outline and course timetable). Yes No
5. I stimulated the interest by identifying the benefits of learning the subject or skills in question. Yes No
6. I was able to establish a warm, mutually respectful relationship with the participants. Yes No

B. Maintaining the climate

- | | Rare-ly | Some-times | Most of the time | Always | N/A |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 7. I encouraged participants to share opinions and ideas. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8. When necessary, I adapted the learning activities to meet the participants' needs. | <input type="checkbox"/> |
| 9. I adapted the pace of the learning activities to the participants' needs. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 10. I felt at ease handling sensitive situations. | <input type="checkbox"/> |

PART 2 : COURSE DELIVERY

- | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| 11. I linked the material to the participants' worklife or to the previous material. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. I presented the lesson objectives both orally and in writing. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. I explained how the lesson objectives would be measured. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. I outlined the lesson content at the beginning of lessons. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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	Rare-ly	Some-times	Most of the time	Always	N/A
15. I delivered the content by following the teaching points as suggested in the lesson plans.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
16. I concluded the lessons by reviewing the objective, recapping the teaching points and linking to the next lesson.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
17. I managed the overall time in accordance with the lesson plan guidelines.	<input type="checkbox"/>				

PART 3 : INSTRUCTIONAL TECHNIQUES

18. I provided clear, coherent, concise explanations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
19. I provided/requested examples related to the teaching points to facilitate learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20. I used a variety of visual support to facilitate the participants' learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21. I used relevant questions to stimulate thinking/confirm learning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22. I acknowledged participants' answers/contributions to the learning process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
23. I felt at ease addressing participants' lack of understanding.	<input type="checkbox"/>				
24. I provided clear instructions for exercises/activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
25. I felt at ease coaching participants during exercises/activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PART 4 : GENERAL QUESTIONS

26. What were your **sources of satisfaction** during this course?

27a. **What**, if anything, **created a difficulty** for you as a trainer during this course?

27b. How are you planning to **prevent this kind of difficulty**?

28. What could you do to **improve this course offering** (e.g., add flipchart to teaching point 3.2)?

RESULTS ANALYSIS

In order to analyze your results, follow the steps below. The process will allow you to identify your strengths and areas requiring improvement. It will also help you to prepare an action plan to help you increase your level of competency as an instructor/facilitator.

- When applicable, answers to questions 1 to 6 should be "Yes".
- For questions 7 to 25, ideally, the boxes in column "**Always**" should be checked. A check in column "**Rarely**" may point out the necessity to improve the area greatly while a check in columns "**Sometimes**" or "**Most of the time**" may be a sign that there is room for improvement.
- **Check** your strengths and areas requiring improvement. Use a two colour code to differentiate them (e.g., green and red).
- Choose one aspect you wish to improve (**one at a time**).
- **Prepare an action plan** to improve your performance. Actions to be taken could include observation of a colleague in the classroom, co-teaching, rereading of reference documents, reading of books from local, departmental or inter-departmental library, discussions with colleagues or your supervisor, etc.
- **Set dates** for the completion of each activity specified in your action plan.
- **Compare your results** from one session to the other, first globally and then, for each type of course to better identify your strengths and your areas requiring improvement.
- **Consult the reference guide** on the next page for books on topics referred to in this self-assessment tool.

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