

PN. ACA-691

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

*INSTRUCTIONAL TECHNIQUES COURSE*

**Instructor's Guide**

**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).**

## **PREPARATORY NOTES FOR TRAINING AND DEVELOPMENT TRAINERS**

### **USING THE COMMON INSTRUCTIONAL TECHNIQUES TRAINING PACKAGE**

The materials consist of the following:

1. Instructional Techniques Reference Material
2. Participant Manual
3. Instructor Lesson Plan/Facilitator Guide
4. Visual Support ( transparencies)

#### **1. THE APPROACH**

The workshop is designed so that participants are given as many opportunities to apply instructional techniques as possible. The approach is a non theoretical, practical one, based on the preparation and delivery tasks required of facilitators of the learning process.

In fact, the goal of the session is to provide the opportunity for the field instructors/facilitators to prepare and practise the delivery of specific work related training as they acquire /improve their instructional techniques. The added value of this approach is that it addresses the concern for the lack of preparation time for field personnel.

As much opportunity as possible for the participants to use their own real training packages has been provided. The opportunity to prepare with assistance and to present with feedback contributes to the effectiveness of the workshop experience

- using the combined package requires that you make decisions to adapt the use of the materials to the particular course participants will be delivering, the experience level of your participants, and the time available
- there are options built into the lesson plan so that you can adjust to a variety of situations

### **3. PRE SESSION CONTACT**

In order to be able to select the most useful IT content and to ensure that the participants are appropriate for your session and that they have the necessary materials, you are advised to make contact with them by telephone.

**Suggested questions for participants include the following:**

1. What assignments for training do they have?
2. What experience have they had?
3. What concerns about training do they have?
4. Do they know if they will be co-instructing?

### **4. LESSON OVERVIEW**

Each lesson focuses on some aspect of the performance expected of instructors/facilitators in a classroom situation. The segments included are the following:

#### **Workshop Introduction**

- sets the context for workshop and has participants share their experience and concerns

### **Lesson 1: Confirming Content Expertise**

- provides opportunity to deal with content issues before focusing on process of instruction

### **Lesson 2: Using a Training Package**

- presents the foundation for skill development in instructional techniques
- participants are introduced to basic learning concepts and see the relationship between their role as facilitators, learning and their training materials
- topics include
  - role of instructor
  - learning process
  - the training package

### **Lesson 3: Introducing the Training Session**

- participants prepare and practise delivery of an introduction, including a workshop/course/lesson objective

### **Lesson 4: Facilitating Learning Activities**

- the major lesson of the session dealing with the instructional methods and the **how to** of each one
- core content in teaching points #1 to 5
- optional content in teaching points #6 to 14
- participants prepare and deliver short segments as required by their training packages using their **real** materials

## **Lesson 5: Managing the Learning Environment**

- deals with the issues related to group dynamics and the handling of both challenging and sensitive situations

### **Workshop Performance Check**

- participants prepare and present a 20 minute segment from their materials, integrating what they have learned during the workshop
- participants use an Observation Checklist to guide their feedback

### **Workshop Conclusion**

- participants reflect on the learning throughout the workshop and complete an Action Planning Worksheet
- participants consider the options for continuous improvement using the Instructor/Facilitator Self Assessment Tool
- participants consider Handling Administration as the link to their training activity

## **5. DESCRIPTION OF INSTRUCTIONAL TECHNIQUES TRAINING MATERIALS**

### **5.1 INSTRUCTIONAL TECHNIQUES REFERENCE MATERIAL**

This document is to be used as the basis for the content for Revenue Canada Instructional Techniques training. The Instructional Techniques Reference Materials contain information critical to effective instruction; they are to be used during the workshop and as a resource on the job.

The Table of Contents presents the topics grouped in three sections. Within each section, there are a number of topics.

Please note the following:

- each topic is identified and a page number given
- the topics are arranged in a logical sequence for the text presentation

- the topics do not necessarily match the order of the way they are used in the workshop
  - e.g., Coaching in the Classroom is under the third section because it makes sense in terms of the written content; however, in the workshop, it is part of the lesson on facilitating learning activities as an optional topic
- since not all topics can be covered during the training for facilitators/instructors, participants will be able to use the reference material as they require it
- references to the Instructional Techniques Reference Materials form part of the workshop activity; page numbers are indicated in the lesson plan

## **5.2 PARTICIPANT MANUAL**

The Participant Manual is to be used throughout the session. It presents lesson objectives and outlines and contains the instructions for the learning activities for participants in the form of practical exercises.

## **5.3 INSTRUCTOR LESSON PLAN/FACILITATOR GUIDE**

This document outlines in detail the process of instruction.

- uses Training and Development four column format
- identifies teaching points, suggested process, training aids and time
  - teaching points are numbered
  - process words are highlighted
  - there are page references for RM
  - times are guidelines, not at all absolutes
- package offers both the needed flexibility as well as the necessary structure for the participants

## **5.4 VISUAL SUPPORT (TRANSPARENCIES)**

The transparencies have been prepared so that you can use them as you wish, to support your workshop activity. There are very few references to transparencies in the lesson plan, as you will want to determine for yourself the best time for their use.

## **6. ENCOURAGING CONTINUOUS IMPROVEMENT FOR PARTICIPANTS**

It is important that participants see this workshop as a vehicle to achieving the goal of becoming a learning organization. The materials are designed to be the first step, to developing skilled field instructor/facilitators.

In order to support the idea of improvement of performance for participants, it will be important to make sure that you allow the 65 minutes necessary for the Workshop Conclusion. The activities in the conclusion provide participants with the opportunity to reflect upon their learning during the workshop and identify areas for action as well as to explore the Instructor/Facilitator Self Assessment Tool. It is during this segment that you can identify the types of support available from the Training and Development Organization.

In addition, throughout the session, you will want to be sure that at the end of each lesson, participants have the chance to reflect upon what they learned relating to instructional techniques.

## **7. PREPARATION OF SESSION**

Preparation for the IT session includes

1. Analyzing identified needs of participants
2. Selecting appropriate learning activities from IT training package and planning your workshop schedule.
3. Personalizing the lesson plan, including the selection of visual support
4. Confirming administration of session. ( rooms, memos, supplies, length of session)
5. Arranging for resources where required. ( e.g., subject matter experts, training coordinators, required equipment)
6. Printing any additional handouts ( e.g., copies of observation checklist, self evaluation forms, articles).

COURSE TITLE: Instructional Techniques for Classroom Instructors/Facilitators

DURATION: Theory: minutes  
Practical: minutes  
Total: 65 minutes ( for Workshop Introduction)

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

SPECIAL FACILITIES EQUIPMENT: video camera and playback equipment  
flipcharts (3)  
overhead projector

OPERATIONAL OBJECTIVE:

Participants will be able to deliver the assigned training to a specific target population.

COURSE TRAINING OBJECTIVE:

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

PERFORMANCE: facilitate assigned workshops/courses

CONDITIONS: given the training package for the assigned workshop(s)/courses(s), the Participant Manual for the Training for 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

EVALUATION OF COURSE OBJECTIVE:

The final performance check of the workshop will ask participants to select and present one of the segments of the customs workshop requiring facilitation. This activity will serve as the means to evaluate the achievement of the workshop objective.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**WORKSHOP  
INTRODUCTION**

**1. Link**

1.1 welcome -course title -purpose	<b>Welcome</b> participants and introduce the session. - training for instructors/facilitators - designed to prepare them to implement training locally as required	FC	2
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1.2 introduction of participants	<b>Have participants introduce</b> themselves, outlining their experience in facilitation of training.	FC	15
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Note: You may wish to use an icebreaker of your choice if participants have not met before.

1.3 admin. details	<b>Highlight</b> class start times, breaks, location of facilities as necessary. Provide list of names to admin area, if appropriate.	FC	3
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**2. Course Objective** 3

2.1 workshop objective	<b>Refer</b> participants to the PM to read the description of the intent of the workshop.		
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**State**

- this workshop is designed to equip instructors/facilitators with the knowledge and skills required to facilitate the learning process in classroom training sessions
- as a department, we moving towards becoming a learning organization
- we, who are involved in FCA training, must see how what we do contributes to the development of such a learning organization

**Refer** participants to the Instructional Techniques Reference Material page 1 to read the definition of a learning organization in order to set the context for the workshop objective.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Highlight** the importance of the challenge to make our training sessions the most effective possible.

FC

2.2 evaluation of workshop objective

**Present** the workshop objective on a flip chart and **post** for the duration of the session.

**Describe** the practical approach and the means of evaluating achievement of the workshop objective.

**Refer** participants to the Participant Manual

**3. Outline**

7

3.1 content

**Refer** participants to the Participant Manual to read the content outline on p I-3 or **present** list on FC.

PM  
FC

3.2 approach

**Describe** the session

- serves as the first step towards the improvement of skills related to the facilitation of learning
- practical, skill-building hands on practise of instructional techniques using real materials from the courses/workshops they are to facilitate
- provides opportunity to learn the language of training and facilitation and to develop their expertise
- focuses on each task expected of the instructor/facilitator separately first and then gives them the opportunity to integrate what they have learned
- allows them to self assess their own learning throughout the session during short

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

presentation activities and with a final performance check

- provides them with the chance to observe and provide feedback to others according to specific guidelines for effective instruction
- provides them with the opportunity to identify their strengths and areas for improvement through the use of self assessment tools and video

**Confirm** timing anticipated using the timetable on p. I- 4

**Introduce** the materials and the equipment they will be using.

**Describe** the use of the Participant Manual and the Instructional Techniques Reference Materials, noting that the Instructional Techniques Reference Material is a valuable resource for those who are tasked with helping others learn. **Point out** its usefulness during the this workshop and as an on the job reference document.

#### 4. Motivation

##### 4.1 benefits of workshop

#### **Highlight** benefits

- allows participants to answer the questions they might have on the issues of delivery
- provides opportunity to
  - practise their preparation and facilitation skills
  - get feedback on their performance from others
  - to assess their own progress during the session
  - to prepare an action plan for their own continuous improvement after the training session

TEACHING POINT

CONTENT/METHOD

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TIME

- to see others in action and to learn from this observation

- provides hands on practise of personalizing the materials that they will be working with

**Introduce** Expectations Exercise as the chance to determine, for themselves, what they want to gain from this workshop.

**Have participants complete** the exercise PM p. I-5 , providing examples of what individual expectations might be, if necessary. **Allow 15** minutes for completion.

PM

20

4.2 personal expectations

**Debrief** exercise by having each group share one or two of their items.

**Identify** those that this workshop can address.

LESSON TITLE: Confirming Content Expertise

DURATION: Theory: minutes  
Practical: minutes  
Total: 60-120 minutes

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

LESSON ENABLING 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 LESSON ENABLING OBJECTIVE:

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

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

**A. LESSON INTRODUCTION**

This lesson is designed to help participants confirm their comfort with the content of the training packages they are about to teach. Our experience in preparing instructors/ facilitators has shown that if they are doubtful about their ability in dealing with content issues, that they tend to focus on the content rather than the facilitation of the learning process. Even in situations where participants have actually taken the course, they seem to appreciate the chance to clarify their understanding.

Our survey of field instructors confirmed the need to address content expertise. If you are not a content expert, you should arrange to have someone who is experienced with the content present during this lesson to answer any questions that remain.

The time suggested for those who have just taken the course the previous week is 60 minutes. For other situations it is possible to use up to 120 minutes.

**Introduce lesson topic.**

-this lesson focuses on the content of your training package

**1.Link**

-you are asked to try to avoid discussing the process of instruction, since the rest of this workshop will address that in detail

**Acknowledge** that they have been selected because of their work experience and their background.

**Make reference** to what has been provided to

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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them as preparation of the content  
e.g., taking the course, walking through the course materials, pre reading, viewing a video, observing the course

If required, complete a content walkthrough, refer to training package content materials or demonstrate all/part of a lesson before proceeding.

**2.Lesson Objective**

**Present** lesson objective on flip chart and leave posted for the remainder of the lesson.

**Have participants read** the description of the evaluation of the objective

**3.Lesson Outline**

**Refer** participants to the Lesson Outline PM **and point out** which of the options they fall into and the necessity to spend some time clarifying content.

**4.Motivation**

**Emphasize** the importance of having their questions answered so that they are able to focus on their development as effective instructors/facilitators.

**B.LESSON BODY**

**1.Identifying Questions on Content**

**Introduce** the main lesson activity which gives them the chance to list the questions they have.

**Refer participants to the Exercise: Identifying Questions on Content** PM and have them read the instructions.

**Ask** for an example of a content question so that participants are clear on what is intended for this lesson.

If necessary, **provide** an example of an inappropriate question.

**Allow time** for completion, circulating to

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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confirm participants are on track.

**Explain** how you would like to structure the answering of the questions.

Some options include the following:

- oral presentation and immediate answer/discussion
- recording questions on flip chart, transparency or handouts and identifying priority for answer/discussion
- answers from content expert/other participants
- questions drawn out of a common pot to be answered in the order of the draw
- questions to be posed by topic/lesson/issue

**Conduct** your answer activity as planned.

NOTE: Consider keeping a record of the questions for your future reference.

**C.PERFORMANCE CHECK**

**Refer** participants to PM, the Performance Check for this lesson.

**Allow** participants time to consider if they have the information they require to be able to answer their questions.

**Ask** if they will need to take further action to improve their content expertise. Make suggestions about where they might access the information, if appropriate.

**D.LESSON CONCLUSION**

**Refer** to the lesson objective as presented during the lesson introduction.

**Have participants report** on their comfort level with the content.

**Summarize** the issues addressed.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Link to the next lesson, Using the Training Package** as the lesson where they can begin to look at the role of the instructor/facilitator in relation to the training they are assigned.

LESSON TITLE: Using a Training Package

DURATION: Theory: minutes  
Practical: minutes  
Total: 150 minutes

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

LESSON ENABLING OBJECTIVE:

At the end of this lesson participants will be able to

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

Conditions: given a training package; individually; with assistance

Standard: according to guidelines provided during the lesson

EVALUATION OF LESSON ENABLING OBJECTIVE:

Participants will be asked to answer questions based on their training package. These questions will require them to demonstrate knowledge of the learning process and to relate this knowledge to their training materials.

**BEST AVAILABLE COPY**

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TRAINING AIDS

A) CODED ITEMS

REFERENCE CODE

Participant Manual

Instructional Techniques Reference Material

B) FORMS AND BOOKLETS

NUMBER      NAME

QUANTITY/PARTICIPANT

C) BOOKS AND MANUALS

NUMBER      NAME

QUANTITY/PARTICIPANT

D) HARDWARE AND EQUIPMENT

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**A. LESSON INTRODUCTION**

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**1.Link**

**Introduce** lesson topic.

- this lesson deals with the use of the training package
- participants are confident of the workshop content
- there is need to examine the training package to see what is provided to them as support for their role as facilitators
- training/facilitation of learning is an area of expertise which requires us to use the language of training and learning, just as you are asked to use the language of Customs in your daily work
- this lesson provides you with the opportunity to learn that language

**2.Lesson Objective**

**Present** lesson objective on flip chart and leave posted for the remainder of the lesson. Refer participants to PM

**Have participants read** the description of the expectations of the performance check of the lesson.

**3.Lesson Outline**

**Refer** to the three topics of the lesson outline PM, briefly describing their relationship to the lesson objective.

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

**4.Motivation**

**Highlight** benefits of lesson

- allows us to think globally about the facilitation of learning
- provides opportunity to examine the structure of

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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the training package

- provides basis for understanding why the materials were designed the way they were
- presents the language of learning, i.e., the jargon needed in order to work in the area successfully

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**B.LESSON BODY**

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1.Role of Facilitator

1.1 Responsibilities

1.2 Required knowledge and skills

**NOTE:** This teaching point puts the focus on the role of the instructor/facilitator. Avoid the temptation to deal in detail with the factors affecting learning since they are to be developed in detail in teaching point #2, The Learning Process.

**State**

- as instructors/facilitators, we are accepting the responsibility for the delivery/facilitation of training
- our role is critical to the success of the learners involved
- there is a need to consider what we should be doing to ensure that we are effective in carrying out the assigned responsibility

**Introduce** Exercise: Role of an Instructor/Facilitator.

- exercise brings out what we know from our previous experience
- serves to focus our thinking

**Refer** participants to PM and ask them to complete the exercise, noting that they will work both individually and in small groups.

**Allow** 10 minutes for completion.

**Debrief** in plenary, asking each spokesperson for one of the characteristics. **Record** responses on flip chart, acknowledging each and **asking for the rationale** for its selection.

FC

**Have participants refer** to reference material on Role as Facilitator of Learning to note the list of required skills and knowledge. **Compare** this list to the characteristics they identified.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
	<b>Highlight</b> the instructor's/facilitator's role as support of the learning process and emphasize its focus on being learner centred.		
2.The Learning Process	<b>Introduce</b> the teaching point as the second topic of this lesson, relating it to the role of the learner centred facilitator.	RM	
2.1. Definition of learning	<b>Ask</b> participants to define learning, providing an example from their own life experience.		2
	<b>Record</b> key words from their definitions on flip chart.	FC	
2.2. Factors contributing to learning success	<b>Highlight</b> learning as process of change in which new knowledge, skill, attitude is acquired.		
-individual preferences	<b>State</b> - given this definition, we are ready to consider what factors contribute to the success of learning		15
-ideal conditions	- the next short exercise allows us to focus on our individual preferences for learning and to <b>generate a list</b> of what we feel contributes to success in learning		
	<b>Introduce</b> Exercise: Factors Contributing to Learning Success PMand have participants complete the activity.	PM	
	<b>Allow</b> 15 minutes for individual and pair work.		
	<b>Debrief</b> in plenary, recording participants' suggestions about the factors that promote the ideal conditions on a flipchart.	FC	
2.3 Characteristics of Learners	<b>State</b> - learner needs are basis for design of learning activities		5
-as individuals	- learners are to be assessed in terms of their		

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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-as adults

characteristics both as individuals and as adults

- as individuals, learners have unique background resulting in development of

- personality
- areas of expertise
- preferences for operating
- identifiable beliefs and values

**Define** learning style and **present** some examples of preferences.

**Ask**

What are the implications of individual differences for designers and instructors/facilitators?

**Expected Response**

- specific needs of individuals must be considered in learning situations
- training must allow for variety in presentation

**Present** the following information on adults as learners using flipchart or transparencies to support lecture.

- although there are individual needs there are some general truths about adult learners
  - research on adults ( M. Knowles) has produced these findings
1. Adults are capable of self direction
  2. Adults bring experience to the learning situation
  3. Adults need to see the benefits of what they are learning
  4. Adults learn best if they have the opportunity to apply what they are learning

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
2.4 Impact on role of facilitator	<p><b>Ask</b> participants the following question.</p> <p>How should this knowledge of adult learners affect the actions of an instructor/facilitator?</p> <p><b>Expected Response</b></p> <ul style="list-style-type: none"> <li>- we should provide opportunity for self direction (avoid total control)</li> <li>- we should draw on experiences of individuals</li> <li>- we should provide rationale for learning activity/content and make it relevant to the needs of the learners</li> <li>- we should ensure there are opportunities for practise</li> </ul> <p><b>State</b></p> <ul style="list-style-type: none"> <li>- our training packages are designed to                             <ol style="list-style-type: none"> <li>1. provide content in a work context</li> <li>2. divide the material into digestible chunks</li> <li>3. allow learners to practice what they are learning</li> <li>4. ensure clarity</li> <li>5. provide stimulation</li> </ol> </li> <li>- as instructors/facilitators we are responsible for implementing the training as designed</li> </ul>		3
2.5 Learning Ladder	<p><b>Present</b> the the Learning Ladder as a model to summarize what we know about learning and our efforts to meet the needs of learners in training.</p> <p><b>Build</b> ladder on flipchart as you highlight the following:</p> <ul style="list-style-type: none"> <li>- The learning ladder is a model which illustrates</li> </ul>	RM	2
-the model			
-how training package supports model			

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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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.

**Inform** participants that the content on the learning process and the learning ladder is presented in the reference materials.

**Introduce** Exercise: Learning and the Training Package as an opportunity to think about the learning required of the participants who will attend their training sessions.

**Have participants refer** to PM and **complete** the exercise in small groups. PM

**Allow** 15 minutes for completion.

**Debrief** the exercise, highlighting the important roles of the design and the facilitator in supporting the learning process.

30

3.The Training Package

**Introduce** topic, suggesting that it is the chance to more closely examine their training package to identify the support given to them in their training assignment.

3

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
3.1 Benefits of the Package	<p><b>Ask the question.</b></p> <p>What are the benefits of having a training package</p> <p>a) for the participants</p> <p>b) for the instructors/facilitators</p> <p>c) for the department</p> <p><b>Expected responses</b></p> <ul style="list-style-type: none"> <li>- effective materials for training (participants learn)</li> <li>- efficient use of training time (reduces preparation and delivery time)</li> <li>- consistent high quality training (organization has trained employees)</li> </ul>	RM	
3.2 Packaging of Training materials	<p>-Instructor Materials</p> <p>-Participant Materials</p>	<p><b>Have participants report</b> what is provided for the</p> <ul style="list-style-type: none"> <li>- instructor/facilitator</li> <li>- participants</li> </ul> <p><b>Have participants determine</b> how the designers have fit the various packages together so that the relationships are clear.</p>	5
3.3 Structure of the course and its parts (lessons/modules)	<p><b>Guide</b> the participants through an examination of the structure of the course, noting</p> <ul style="list-style-type: none"> <li>- the course introduction</li> <li>- the number of lessons/modules</li> <li>- the course test/final exercise/performance check</li> <li>- the course conclusion</li> </ul> <p><b>Draw</b> participants' attention to the relationship between the course objective and the lesson objectives. Note that the next lesson will deal thoroughly with the formulation of objectives.</p>		30
3.4 Content of Lesson	<p><b>Introduce</b> Exercise: Exploring a Lesson Plan PM</p>		

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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Plan

- exercise allows discovery of what is provided to them
- participants to select lesson from their course

PM

**Have participants complete** the exercise, noting answers in point form.

**Allow 15 minutes** for completion.

**NOTE:** Some packages may expect facilitators to refer to Support Materials in addition to the Lesson Plan.

**Debrief** exercise by taking up their findings. Clarify any concerns.

**Highlight** the value of the information provided to them in materials.

- guidance as to content
- guidance as to process i.e., what to do, the time suggested

**Tell** participants that they will be personalizing the lesson plan as they use the materials throughout the rest of this workshop.

**C.PERFORMANCE CHECK**

**Introduce** this final exercise of the lesson as the chance to reflect on the relationship between the learning process and the training package they are to work with.

20

**Have participants refer** to PM and **complete** the activity individually or in pairs.

PM

**Allow 10 minutes** for completion.

**Debrief** in plenary, emphasizing that the training package has been designed with the needs of the participants in mind.

**D.LESSON CONCLUSION**

**Refer** to lesson objective and have participants reflect on their achievement.

5

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Summarize** the main point of the use of the training package as a means of facilitating the learning process for participants.

**Emphasize** that as they use their materials during this workshop, they will discover how to personalize their lesson plans.

**Link** to the next lesson which deals with an important task of instructors/facilitators, that of introducing their sessions.

LESSON TITLE: Introducing the Session

DURATION: Theory: minutes  
Practical: minutes  
Total: 215 minutes

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

LESSON ENABLING 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 LESSON ENABLING OBJECTIVE:

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

TRAINING AIDS

A) CODED ITEMS

Participant Manual

B) FORMS AND BOOKLETS

<u>NUMBER</u>	<u>NAME</u>	<u>QUANTITY/PARTICIPANT</u>
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C) BOOKS AND MANUALS

<u>NUMBER</u>	<u>NAME</u>	<u>QUANTITY/PARTICIPANT</u>
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D) HARDWARE AND EQUIPMENT

Video camera and play back unit

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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A. LESSON INTRODUCTION

10

1. Link

**Introduce** topic of lesson.

- participants now know the content of the session they are to facilitate
- important to address their task of introducing sessions to their own learners
- lesson focus is on the effective introduction of training courses and workshops

2. Lesson Objective

**Present** lesson objective on flipchart. Refer participants to Participant Manual

**Describe** the activity of presentation of an introduction as the performance check of the lesson.

3. Outline

**Present** outline of teaching points on flipchart.

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

**Refer** participants to the appropriate reference material related to the lesson topic.

**Highlight** benefits of lesson

4. Motivation

- provides opportunity to prepare and try out the presentation of an introduction from their materials
- provides opportunity for them to provide others with feedback and to receive feedback on their presentation

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**B. LESSON BODY**

1. Purpose of an Introduction

Ask participants

1.1 Preparing Learners

**What is the purpose of an introduction to a training session?**

FC

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1.2 Establishing Climate

**Record** responses on flip chart, asking for the reasons for each response.

1.3 Gathering Information about Learners

**Summarize** the results, **grouping** them into the three categories of preparing learners, establishing climate, and gathering information about learners and **highlighting** the importance of each.

If appropriate, **highlight** icebreaker activities as a means of accomplishing all three. (generally, the particular course will have definite icebreaker activity as part of the design)

**Refer** participants to reference material as reinforcement of the teaching point, if appropriate.

RM

Ask participants

**How does the course/workshop introduction differ from the lesson introduction?**

**Expected Response**

- shorter
- no icebreaker/introductions required
- perhaps less focus on establishing climate and more on preparing learners

2. Components of an Introduction

**State** that an effective introduction has four components.

RM

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TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
<ul style="list-style-type: none"> <li>- Link</li> <li>- Objective</li> <li>- Outline</li> <li>- Motivation</li> </ul>	<p><b>Introduce the Exercise:</b> Components of an Introduction as an opportunity for participants to examine their course materials to discover what these components are.</p>	PM	
	<p><b>Have participants refer</b> to the PM and <b>complete the activity.</b></p>		
	<p><b>Debrief</b> in plenary, emphasizing the effect of each component on the learning process.</p>		
2.1 Link	<p><b>State</b> that the component often misunderstood is the objective.</p>		
<ul style="list-style-type: none"> <li>2.2 Objective</li> <li>- definition</li> <li>-course training objective</li> <li>-lesson enabling objective</li> </ul>	<p><b>Define objective and explain</b> the relationship between a course objective and a lesson objective using an example.</p>		10
	<p><b>Highlight</b> that the objective is to describe observable, measurable performance from the learners' point of view.</p>		
	<p><b>Have participants complete</b> the Exercise: Observable Performance Identification, PM</p>		
	<p><b>Debrief</b> in plenary/have pairs compare results.</p>		
<ul style="list-style-type: none"> <li>2.2.1 Components of an objective</li> <li>-performance</li> <li>-conditions</li> <li>-standard</li> </ul>	<p><b>Introduce Exercise:</b> Components of an Objective and have participants examine one of the lesson objectives from their materials to complete it.</p>	PM	
	<p><b>Summarize</b> the components, emphasizing the focus an objective provides to learners.</p>		
	<p><b>State</b></p> <ul style="list-style-type: none"> <li>- objectives should be presented both orally and in writing</li> </ul>		5
<ul style="list-style-type: none"> <li>2.2.2 Presentation of Objective</li> </ul>	<ul style="list-style-type: none"> <li>- the means of evaluating the achievement of an objective should be described</li> </ul>	PM	
	<ul style="list-style-type: none"> <li>- outlines provide learners with sense of direction</li> </ul>		5

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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2.2.3 Presentation of Evaluation of Objective

- learners are motivated when they can see the relevance of the content and process to their needs

2.3 Outline

- an effective introduction includes the four components

2.4 Motivation

**Introduce Exercise:** Preparing an Introduction.

- chance to prepare an intro from the materials they will be presenting
- participants to choose the introduction of their course or of a lesson
- checklist PM presents list of items for consideration

**Have participants refer** to the checklist and clarify any items for them.

**Explain** how this tool is to be used for guiding feedback during the presentations of their introductions.

PM  
PM

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**Allow** 20 minutes for preparation.

**Debrief** preparation activity by asking if they have any concerns.

135

**C. PERFORMANCE CHECK**

**Introduce** Performance Check.

PM

**Refer** participants to PM and have them read the instructions.

**Clarify** process as required and arrange for sequence of delivery.

**Video** each delivery and **play** a portion of the tape during the feedback.

**D. LESSON CONCLUSION**

**Have participants highlight** what they think is

5

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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important about introducing a session.

**Refer** to lesson objective to see if participants feel they have been successful in its achievement.

**Link** to the next lesson **Facilitating Learning Activities**.

LESSON TITLE: Facilitating Learning Activities

DURATION: Theory: minutes  
Practical: minutes  
Total: xxx minutes ( time TBA by facilitator)

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

LESSON ENABLING 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 LESSON ENABLING OBJECTIVE:

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

TRAINING AIDS

A) CODED ITEMS

Participant Manual

Instructional Techniques Reference Material

REFERENCE CODE

E\ 303&370\93

E\ITRM\93

B) FORMS AND BOOKLETS

NUMBER

NAME

QUANTITY/PARTICIPANT

C) BOOKS AND MANUALS

NUMBER

NAME

QUANTITY/PARTICIPANT

D) HARDWARE AND EQUIPMENT

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**A. LESSON INTRODUCTION**

**NOTE:**

10

This lesson has 14 teaching points; five of these are **core** to the workshop and the remaining nine are available as options.

**Identify in advance** which of the optional points you plan to cover and to what extent. Designers of the decentralized courses/workshops may wish to recommend those they feel are most important.) The Instructional Techniques Reference Material for participants will contain all the topics and the participant manuals for the workshop will include all the relevant activities.

**SUGGESTION:** You may wish to have participants select a teaching point from which they can work on the exercises in this lesson. IT may be that they will have to use more than one teaching point to accommodate the different facilitation tasks.

**Introduce** lesson topic.

- this lesson deals with the facilitation of learning activities
- facilitation is critical to the performance of instructors/facilitators
- facilitation is the key to the success of learners

**1.Link**

**2.Lesson Objective**

**Present** lesson objective on flip chart and leave posted for the remainder of the lesson. Refer participants to PM

PM

**Have participants read** the description of the expectations of the performance check of the lesson.

**3.Lesson Outline**

**Refer** to the topics of the lesson outline PM,

PM

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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indicating which of the topics are to be part of this particular session

**Note** that each lesson topics deals with one important aspect of facilitating learning; by examining them individually, participants will have the chance to focus on each type of facilitation task.

**4.Motivation**

**Highlight** benefits of lesson

- allows us to practise the **facilitation** of learning activities related to real training materials
- serves as opportunity to practise the **preparation** for facilitation and to experiment with **personalizing** the lesson plan for each type of facilitation task/instructional method
- provides opportunity to receive **feedback** and to **discover** what works/doesn't work from observing others in action

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**B.LESSON BODY**

15

1.Instructional Methods	<b>Explain</b> the term instructional method, clarifying the difference between training method and instructional method by <b>stating</b>	RM	
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- Course designers select the best combination of learning activities to ensure that all learners will have the opportunity to achieve the course training objective.
- They select both the training method and 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.
- Our department has a number of **training methods** in use
  - instructor-led courses
  - modified instructor-led courses
  - self study courses
  - computer based training
  - on-the-job training and coaching.
- Within each of these a number of teaching techniques are 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.

1.1 Methods Available

Ask the question

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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	What instructional methods are present in your training package?	FC	
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	List responses of flip chart as they are given.	PM	
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**Refer** participants to PM p. 4.3 and have them discuss the level of learner involvement by asking them to think about what the action of the learner is for each of the methods listed.

**Highlight** the relationship between learning and the level of participant involvement.

- the higher the level of involvement, the more effective the method in the acquisition of new knowledge and skills

1.2 Criteria/conditions for use

	<b>Refer</b> participants to the reference material on instructional methods to identify the conditions and criteria for the use of the four categories for the instructional methods listed.	RM	
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**Ask** participants to consider why the criteria are appropriate for each category and if they agree with them.

**Have participants suggest an example** of content for each of the four categories.

**Emphasize**

- that all instructional methods can be effective;
- it is important to have variety
- instructors/facilitators must be skilled in the instructional methods identified in the design of a training package

	<b>Introduce</b> Exercise: Identifying Instructional Methods PM as a chance for them to examine in more detail the instructional methods of one the lessons from their training materials.	PM	15
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TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

**Allow** 10 minutes for completion of the examination using the questions as a guide.

**Debrief** in plenary, asking participants to comment on the level of involvement of the learners.

**State** that the rest of this lesson will focus on the preparation and practise of the facilitation of the instructional methods required by the design of their training packages.

## 2. Using Visual Support

### **Introduce** topic

Rm p.

- Visuals are an effective means of supporting lesson content, no matter what the instructional method selected.
- We can look at visuals as **projected visuals** such as overhead transparencies and computer slide-shows and **non-projected visuals** such as flipcharts, chalkboards and whiteboards
- Successful instructors make the most out of the training aids available by planning for the use of the visual and meet the criteria for both good design and use of the visual equipment.



TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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retention of the learner.

2.2 Planning the Use of  
Visuals

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**Introduce** planning of the use of visual support as important part of preparation.

**Refer** participants to the list of planning steps in reference materials. RM

**Demonstrate** the steps by having participants apply them to an example ( either a transparency or a flip chart you have used during this session)

NOTE: For 2.3 and 2.4, there are two options available.

OPTION 1: Have participants work individually/in small groups to prepare and present content. This activity is found in the PM Exercise: Using Visual Support (Option #1)

(70m)

OPTION 2: Use combination of lecture, question and answer, and demonstration to present content followed by participant completion of activity to prepare and present visual support item for critique. This activity is found in the PM Exercise: Using Visual Support (Option #2)

**NOTE: The following describes OPTION #2.**

2.3 Principles of Design  
for Visuals

**Present** examples of your own choice to get reaction of participants as to their impression of what is effective. Include a range of quality in your examples.

TR/FC

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TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Ask** participants to suggest why they like/don't like samples to help them become sensitive to their preferences/ concerns.

**Reinforce** the principles of visibility, simplicity, and clarity as presented in reference materials.

2.4 Criteria for Design and Delivery

35

-Colour and Graphics

**Refer** participants to reference material to note research and guidelines on use of colour and graphics. Encourage reaction to text and clarify understanding through use of examples.

RM

-Projected Visuals

**Introduce** list of guidelines for design of projected visuals and **demonstrate** the guidelines for their delivery.

-Non Projected Visuals  
-flipchart  
-chalk/white board  
-handouts

**Introduce** list of guidelines for design of non projected visuals and **demonstrate** the guidelines for their delivery.

**Summarize by asking** participants to suggest some of the important things about using visuals that they will want to remember.

**Introduce Exercise: Using Visuals (Option #2)** PM as chance to prepare a visual following the steps and criteria of design. ( Participants may wish to choose a visual from the teaching point they have identified as their focus.)

PM

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**Allow** 15 minutes for completion.  
**Have participants critique** in pairs or **ask for volunteers** to have their product critiqued in plenary.

NOTE: If you choose the latter, you will want to provide your feedback to those whose product is not critiqued individually.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
3. Giving an Explanation	<p><b>Introduce</b> topic</p> <ul style="list-style-type: none"> <li>- instructors/facilitators plan the implementation of the instructional methods related to the content to be presented</li> <li>- 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</li> </ul>	RM	10
3.1 Methods requiring explanation	<p><b>State</b></p> <ul style="list-style-type: none"> <li>- most of the instructional methods require that the instructor/facilitator explain something e.g.,                             <ul style="list-style-type: none"> <li>- lecture demands that instructors explain concepts related to lesson content,</li> <li>- demonstration asks instructors to describe what is being demonstrated,</li> <li>- discussion expects instructors to clarify discussion points and build on what has been said</li> <li>- those methods involving practical exercises require explanation of process as well as clarification of content.</li> </ul> </li> <li>- no matter the instructional method, instructors/facilitators are asked to present information to participants</li> </ul>	TR/FC	
3.2 Effective Delivery Techniques	<p><b>Have participants read</b> the notes in the reference material to identify the four techniques suggested for success.</p> <p><b>Follow up</b> the reading activity with a discussion to highlight each technique and by having participants suggest examples from their own experience.</p>	RM	15
3.3 Preparation Steps	<p><b>Present</b> the 10 steps, having participants refer to</p>	RM	10

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
	<p><b>the reference material and leading</b> a discussion on the rationale for sequence of the steps presented.</p> <p>NOTE: Clarify that the objective is not the training objective, but rather the presenter's objective related to the information to be presented.</p> <p><b>Introduce</b> Exercise: Giving an Explanation/Lecture as found in PM</p> <ul style="list-style-type: none"> <li>- an activity that allows participants to practise presenting information</li> <li>- opportunity to gauge time for 3 - 4 minutes of presentation time</li> </ul>	PM	55
	<p><b>Refer participants to checklist</b> on PM p.4.10 as a guide for their preparation and feedback.</p> <p><b>Allow</b> 15 minutes for preparation.</p> <p><b>Arrange</b> for presentations as an individual presentation to a small group (2 or 3 other participants) OR if time permits, in plenary to the entire class.</p> <p><b>Debrief</b> exercise in plenary, highlighting the techniques for successful explanations.</p>	PM 4.10	
4. Effective Questioning	<p><b>Introduce</b> topic</p> <ul style="list-style-type: none"> <li>- an important part of preparation includes examining lesson materials to see where question and answer is required as one of the instructional methods</li> <li>- we will look at this technique to identify how this method can be effectively used to support the learning process</li> <li>- questioning is typically used when learners have some degree of expertise on which to draw or when they have access to reading materials</li> </ul>	RM	10

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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- as a technique, it is valuable in combination with other instructional methods, such as lecture or demonstration

4.1 Value to Learning Process

**Ask the question**

Why is questioning an effective instructional method?

**Record** key words on flip chart as answers are provided. **Elicit** examples to illustrate the points made. FC

**Summarize** responses by highlighting the fact that questioning serves to  
 - stimulate involvement of learners  
 - confirm the learning of participants

4.2 Factors Affecting Success

**Present** the three factors on a flipchart i.e., FC  
 1. intended use  
 2. criteria for question formulation  
 3. questioning process

25

**Deal with each item through the use of questioning** to demonstrate the process as follows.

4.2.1 intended use

**State**

- from the point of view of presenting material, questions can be seen as having three uses

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

**Ask the question**

When would you use questions to either introduce or develop a point?

**Expected Response**

- if learners have experience/expertise

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- if you want learners to apply what they are learning immediately

**Ask the question**

What does using questions in concluding a point achieve?

**Expected Response**

- serves to reinforce important information
- confirms understanding

4.2.2 Criteria for question formulation

**State**

- Facilitators/Instructors who become skilled in the use of questions pay attention to the intended use of questions in order to ensure that their use of questions is appropriate to the learner needs
- they also pay attention to the criteria for question formulation

**Ask the question**

What makes a good question?

**Record** answers on flip chart, asking participants for examples to illustrate their criteria.

**Refer participants** to reference materials to compare the points made. **Discuss** any points of difference.

RM

**Highlight** the need for questions to be formulated so that they are

- clear, concise, correct
- at appropriate level of difficulty
- relevant

4.2.3 Questioning Process

**State**

- a third and very important factor in the successful use of questioning is the questioning process

FC



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4.3 Directions of Questions

**State**

- another aspect of questioning to think about the direction of questions
- as facilitators, we address questions to the whole group and then select someone to respond; these techniques are labelled as OVERHEAD and DIRECT questions
- if participants are asking the questions, it is a good idea to promote the involvement of other participants rather than providing the answer yourself; you RELAY the question to others or, in some cases, REVERSE the question to the participant who asked it

RM

**Have participants provide** examples of each

**Introduce Exercise: Acknowledging Participants' Answers** PM

PM

25

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

- This exercise is designed to help us outline a strategy for acknowledging answers

**Allow** 6 minutes for pairs to come up with their ideas for one or more of the three types of answers.

**Debrief** in plenary, discussing the rationale for each option recommended.

**Expected Responses**

1. Correct - recognize /reinforce
2. Partially Correct - recognize correct portion / build on correct
3. Incorrect - provided opportunity to have participant self correct / ask others for their response/ clarify understanding of question

**Highlight** need to focus on appropriate content

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and to avoid evaluative judgement of respondents, using yourself as the example.

**Introduce** Exercise: Preparing Questions PM as a way of relating the content on questioning to their own training package. PM

30

**Have participants work** individually to complete #1 of the exercise **allowing** 6 minutes for preparation.

**Organize** the completion of #2 of the exercise for plenary or pairs.

**Summarize** the points relating to questioning as an instructional method, including its value and the factors affecting its success.

NOTE: This teaching point has presented the basics of questioning. It is recognized that for some training packages, the technique is to be developed further under the teaching points on the use of exercises, the discussion methods and the experiential approach. Since these involve the use of questions, participants will be given opportunities to practise questioning.

5. Implementing Exercises

**Introduce** topic

RM

30

- training packages are designed with participant activity in mind
- this activity takes the form of **exercises or activities**, two terms which are used interchangeably
- we will be looking at these learning activities to see how we can implement those designed for us effectively in our classroom situations

**Ask the question**

5.1 Exercises and Learning

What do think the relationship is between the exercises/activities and the learning process?

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**Expected Answer**

- exercises\activities are critical to learning
- important opportunity to apply what is being learned; reinforce what is correct and receive valuable feedback on what needs improvement
- useful for assessing success of learning

5.2 Individual vs Group

**State**

- Exercises offer opportunity to vary the dynamic of the classroom
  - Some participants prefer working individually while others prefer working with others in small groups
  - Learning styles vary e.g., some participants find reading easier than listening, others like small group discussion

**Have participants share** their personal preferences to establish need to accommodate differing views.

**Refer participants to the options** listed in the reference materials or post list on flip chart. RM

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

**Ask participants** to think of their own training package and to recall which of the options were in the course design.

**Ask them to assess** if the options are appropriate to the nature of the content.

5.3 Types of Exercises

**Refer participants** to types of exercises listed in RM

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reference materials to have them identify which types they remember as part of the design of their training packages.

**Highlight** the fact that the most effective exercises are those which provide participants with the chance to practise what they have to do on the job.

5.4 Techniques for Exercises

**State**

- instructors/facilitators must consider that 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
- 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.

**Introduce Exercise: Examining Exercises PM**

PM

- exercise gives them a chance to discover the use of exercises/activities in one of their lessons.
- answering the questions will help them to see what support is available to them to

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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implement the exercises

**Allow** 10 minutes for completion.

**Take up** their findings, addressing any concerns.

**Introduce Exercise: Implementing Exercises PM**

- exercise asks participants to prepare and practise either an introduction or a take up of one of the exercises/activities in their training package PM

40

- participants select one exercise/activity that they feel would be a challenge

**Allow** 10 minutes preparation.

**Have participants deliver** their introduction or take up to **two** other participants for a maximum of 5 minutes per presentation and 5 minutes for feedback.

**Circulate** to observe portions of the presentations.

**Debrief** activity in plenary, asking participants to report on what they observed.

NOTE: Another option for this teaching point in the #370 version of the workshop would be for the workshop facilitator to demonstrate the introduction of one of the exercises from the participant common training package.

**Summarize the teaching point by highlighting** the four techniques for implementing exercises or **refer** participants to the reference materials, **Implementing Exercises Effectively.**

RM

**OPTIONAL  
TEACHING POINTS**

It is intended that the trainer select from the following teaching points those that relate most closely to the training package that the

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participants are preparing to teach. For example, if their training sessions require facilitation of roleplays, you will want to include the teaching point on Implementing Roleplays.

The teaching points from which to choose include the following:

6. Experiential Learning as an Approach to Instruction  
(15 m)
7. The Group Discussion Instructional Methods  
(90m)
8. Giving Demonstrations/Walkthroughs  
(90m)
9. Implementing Roleplay Activities  
(90m)
10. Coaching in the Classroom  
(90m)
11. Implementing Case Study/Simulation Activities  
(90m)
12. Using Video Materials  
(90)
13. Concluding Sessions  
(60 m)
14. Co Instruction  
(60 m)

The times listed include the practise activities.

**NOTE:**

The Reference Materials contain the critical content on each of the optional teaching points. Even though it is not possible to deal with each one in depth during the workshop, participants are to access the appropriate reference materials, should they select the corresponding method as their final performance check for this workshop.

6. Experiential Learning  
as an Approach to

RM

15

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Instruction

**Introduce** topic by referring to the instructional methods dealt with earlier.

- we saw that the greater the level of learner involvement, the more effective the instructional method was in supporting the learning process
- we know from our own experience that we learn by doing
- often a trial and error approach works because we discover first hand what does and does not work
- this is exactly what the experiential model of learning concerns itself with

**Present** the four stages of the cycle on a flip chart using a circle to illustrate that it is cyclical.

concrete  
experience

active      reflective  
experimentation    observation

abstract

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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conceptualization

**Explain** each stage using an example related to your own experience. (e.g., learning to drive a car)

**Highlight** the fact that as individuals, we may have a preference for using our best developed abilities, but that generally, we all can use each of the adaptive abilities to varying degrees.

**Have participants identify** which exercises from this workshop have been experiential in nature.

**Refer participant to the reference materials to find** what is expected of a facilitator for experiential learning.

**Have participants identify** from their training package an activity which will required them to debrief the experience to highlight important content and discuss what the approach could be.

NOTE:

If the experiential approach is part of the training package for participants to facilitate, they are likely to be given the opportunity to practise a debrief in the activity to follow, discussion methods/ demonstrations and walkthroughs/ roleplay/ case study or simulation/ using video materials.

7.The Group Discussion  
Instructional  
Methods

**Introduce** teaching point by linking it to the questioning process.

RM

90

- Questioning becomes discussion when you want to encourage participants to generate and consider a number of alternatives for situations involving
  - problem sharing
  - sharing of knowledge and experience
  - evaluation of solutions to a problem

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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- Discussion can occur in plenary or in small groups
- Without formal restrictions on the way it is handled, we refer to the method as discussion
- If you place the restriction of having a period of generating ideas without evaluation followed by a period of clarification and evaluation, we refer to the method as brainstorming

**Demonstrate** the use of brainstorming by asking the following question

**What do you think are the four most important things a discussion leader should do?**

**Allow** 3 minutes for participants to generate answers.

**Record** all answers on a flip chart, reminding them that they are not judging the responses just yet.

Then **ask participants to examine** the list to prioritize those things that are most critical; as they evaluate the items listed, **have them give the rationale** for their selection of priority items.

FC

**Summarize** the conclusions from the brainstorming activity.

**Refer participants** to the reference material, The Group Discussion Methods to **note** the twelve responsibilities of a discussion leader and the six steps outlined for brainstorming.

RM

**Refer** participants to the Exercise: Facilitation of a Group Discussion Activity PM

**Confirm** the groups they will work in. (4 to 5 per group).

PM

**Allow** 10 minutes preparation.

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**Have each group complete** the facilitation of the discussions to a maximum of 5 to 8 minutes/person and the feedback to a maximum of 3 to 5 minutes/person.

**Debrief** in plenary, asking participants to report some examples of effective behaviours for a group discussion leader.

8. Giving Demonstrations /  
Walkthroughs

**Introduce** topic

RM

90

- 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.
- **demonstration** refers to the performance of a task where learners are watching and listening to a description of the task
- the term **walkthrough** denotes 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 they are able to perform or discuss the task
- often the two terms are used interchangeably

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**Ask the question**

Why are demonstrations/ walkthroughs effective?

**Expected response**

8.1 Rationale for demo/walk

- allows the learner both to see and hear the required performance
- use of the two senses serves to stimulate thinking and to clarify the task to be learned
- can reduce the time required for instruction
- visual support provides the learner with a concrete experience

8.2 Steps in demo/walk

**Have participants refer** to reference materials on topic to read the four steps suggested

**Ask the question**

What are some of the challenges for instructors/facilitators in following these steps?

**Expected Response**

- ensuring everyone can see
- making sure equipment is in working order
- coordinating the action and the description
- remembering to check comprehension through the use of questions

**Refer** participants to Exercise: Giving Demonstrations/Walkthroughs PM

PM

**Introduce activity** as the opportunity to prepare and practise a demonstration/walkthrough and to get feedback on the clarity of the presentation.

**List** the appropriate criteria on which to provide

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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- feedback on a flip chart
- introduction of demo activity
- clarity of message
- pace of demonstration
- use of questions to check understanding
- having participants describe /perform task
- repeated as necessary

NOTE: criteria will vary with requirements of demo/walkthrough

**Suggest** that feedback be recorded in note form to be given to the presenters after providing feedback orally

**Circulate** during the preparation to answer any questions

**Assign** small groups ( 3 to 4) as necessary or if equipment demands it or time permits, have delivery occur in plenary.

**Debrief** activity by having participants highlight the important aspects of giving a demonstration.

9.Implementing Role play Activities

**Introduce topic**

RM

90

- one of the most effective learning activities for the practise or discovery of skills is the roleplay
- used widely in communication training
- started out as a counselling or therapy technique
- quickly picked up by trainers

**Define roleplay**

- 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.

Ask participants to share their experience /

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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concerns about roleplay activities.

**Point out** that it is important that roleplays be well implemented if they are to achieve the desired effect.

9.1 Benefits of Roleplay

**Have participants suggest** why roleplays are a valued instructional method.

**Highlight the following:**

- 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.

**NOTE:**

It is recommended that you bring out the fact that roleplays are experiential in nature. If the roleplays in the training package are designed so that learners discover what works/doesn't work, and you have not included teaching point # 6 as part of your session, you should consider a brief presentation of the teaching point now.

9.2 Roleplayer and Observer Responsibilities

Have participants read the reference material, Implementing Roleplay to discover the answers to these questions which you post on a flipchart.

RM

9.3 Materials Required

**Questions**

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
9.4 Factors Affecting Success of Roleplay Activities	1. What are the responsibilities of a roleplayer and an observer?		
9.5 Setting Up a Roleplay	2. What are the responsibilities of the instructor/facilitator?		
9.6 Coaching during the Roleplay	<b>Allow</b> time for participants to read the text. (about 4 minutes)		
9.7 Debriefing Roleplays	<b>Discuss</b> the answers to the two questions, highlighting the role of the facilitator in the setting up, coaching and debriefing of the roleplay.		
	<b>Refer participants</b> to PM to the Exercise: Implementing Roleplay Activities.	PM	70
	<b>Determine as you clarify</b> the directions how long you recommend they spend on the preparation items 1 to 4.		
	<b>Identify</b> your choice of fishbowl or video for item 5. If you choose the fishbowl option, arrange for your volunteers in advance. You may wish to play one of the roles yourself and spend some time with the other role player planning the roleplay.		
	<b>Complete in plenary</b> items 6 and 7, asking for the feedback to focus on		
	<ul style="list-style-type: none"> <li>- highlighting of strengths</li> <li>- use of constructive ways to address areas in need of improvement</li> <li>- the summary of important points</li> <li>- the use of roleplayer and observer reports</li> <li>- the use of video play back, if appropriate</li> </ul>		
	<b>Summarize</b> the main points noted in the take up of item 7		
10. Coaching in the Classroom	<b>Introduce</b> topic	RM	90

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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10.1 Definition of Coaching

- coaching participants as they complete the exercises or learning activities is an important part of facilitating the learning process
- we have many coaching opportunities both in the workplace and outside it
- we can say that there are probably several years of coaching experience in our group
- we will examine coaching in the light of participants during a training session

**Present** definition, highlighting key words on a flip chart

- 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.

**State**

- 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.

10.2 Role of Coach

**Ask participants to list** what a good coach does.

**Record** responses on a flipchart

FC

**Highlight**

- 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.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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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.

**Option #1:**

**Introduce Exercise: Coaching Participants in Training PM** and have participants complete it as directed.

**Option #2:**

**Guide** participants through the reading of the reference materials using the following process.

**Refer** participants to the reference materials on Coaching in the Classroom . (Note that this topic is under the section Managing the Learning Environment.)

RM  
PM

**Lead** participants through suggested procedure and **have them suggest examples** for each of the seven steps listed.

10.3 Coaching Procedure

**Draw attention** to the guidelines for coaching. **Ask participants to select** which of the guidelines listed are the most important.

RM p.89-91

10.4 Guidelines for Coaching

For each one suggested, **have participants provide a reason** for their response.

10.5 Guidelines for Constructive Feedback

**Refer participants to the guidelines** for Giving Constructive Feedback and provide an example/or have participants suggest examples to illustrate them.

RM

**Introduce Exercise: Coaching Participants in Training PM** and have participants complete as directed.

**Debrief** in plenary, noting the importance that

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
11. Implementing Case Study/Simulation	coaching plays for learners in the classroom		
	<p><b>Introduce</b> topic.</p> <ul style="list-style-type: none"> <li>- case study/simulation has proven to be a powerful learning tool</li> <li>- can be used as a practise activity or as a discovery activity (experiential)</li> <li>- case studies present detailed accounts of situations for analysis and action by the learners.</li> <li>- simulations try to duplicate situations as they would be found on the job and ask learners to perform as they would on the job.</li> </ul>	RM	90
11.1 Benefits of Case/Simulation Approach	<p><b>Ask</b> participants to justify the statement that case studies are powerful as a learning tool.</p>		
	<p><b>Record</b> responses on flip chart</p>	FC	
	<p><b>Highlight</b> that</p> <ul style="list-style-type: none"> <li>- approach provides opportunity to face the circumstances of the real world in a safe environment</li> <li>- 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.</li> </ul>		
11.2 The Materials	<p><b>Refer participants to the Exercise: Implementing Case Study/ Simulation</b> PM</p>	PM	
	<p><b>Introduce</b> activity</p> <ul style="list-style-type: none"> <li>- activity designed to have them examine the materials available to them in their training package</li> <li>- provide them with opportunity to prepare for</li> </ul>		

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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their implementation and to practise its introduction

**Have participants complete #1** of the instructions.

In plenary, **discuss their findings** as per instruction #2.

**Clarify** that participants understand the role assigned to the facilitator through the use of questions.

In plenary, **have participants suggest** the reason for each of the preparation steps as described in the reference materials. ( instruction #3) RM

**Assist** in the selection of an appropriate activity for participants to introduce.

**Allow** preparation time. ( about 15 minutes)

**Have participants work in groups** of 3 or 4 to present their introductions. Suggest that the maximum presentation time be 8 minutes with 3 minutes feedback per participant.

**Debrief** activity by having participants report on their performance and observations.

**Highlight** the importance of preparation for instructors and facilitators and the critical aspects of the facilitator role in providing explanation, using questions and leading discussion.

12. Using Video Materials

**Introduce** topic RM

90

- more and more are we becoming a society  
reliant on the image rather the written word
- our education and training has taken advantage  
of the video since it has allowed film to be  
easily available
- training packages can be designed so that the use

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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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.

**Present** the four ways video is used on flip chart FC

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

**State**

- 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.

**Have participants refer** to their training package to identify the purpose(s) of the video portions of the materials.

**Refer participants to Exercise: Using Video Materials in Training** PM

**Discuss** their findings for instruction #1, noting if there can be more than one purpose to viewing the same video segment.

In plenary, **guide** the listing of what is expected of the instructor/facilitator on a flip chart. FC  
 (instruction #2) and **lead the discussion** on the items listed in the reference materials on the preparation and the instruction steps. RM

TEACHING POINT

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TIME

**Assign** completion of instructions #3 and 4.

**Circulate** to answer questions as required.

**Have participants present** their introductions in small groups ( 3 or 4), or, if time permits, in plenary for feedback on the clarity of the message.

NOTE: Some participants may require use of equipment and video tape; if so, conduct those presentations in plenary.

**Have participants answer** the question posed in instruction #5 to focus on the need to see the use of video as a learning tool.

**Emphasize the importance** of taking advantage of the medium to draw out the points to be made and avoiding the common pitfall of treating the film as entertainment.

**Debrief** the activity, highlighting the instructor/facilitator role in making use of film.

**Suggest** that participants choose a portion involving a video segment for the final performance check of this course.

13. Concluding Training Sessions

RM

60

**Introduce** topic

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

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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13.1 Purpose of Conclusion

**Ask** participants what the impact of not having a conclusion is.

**Stress** in the discussion that a conclusion

- 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. (consolidation of learning)
- provides the opportunity for learners to assess the change resulting from the learning activities, the change evidenced by the acquisition of knowledge and skills.
- offers the learner a chance to establish for themselves, a new threshold from which they can work to further improvement.

13.2 Delivery of Conclusion

**Have participants refer to Exercise: Concluding Training Sessions PM** PM

**Assign** small groups for the completion of the exercise, confirming with them the time for preparation and presentation of their conclusions. (If time permits, have some presentations done in plenary.)

**Circulate** to assist in the preparation and to observe the presentations.

**Debrief** the activity, emphasizing what makes for the effective delivery of conclusions.

14. Co Instruction

**Introduce topic** by asking participants about the possibility of them instructing/facilitating as a team. RM

60

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

**State**

- the fact that we share responsibilities for facilitating the session can affect the success of the session
- critical is the question of whether those facilitating are a TEAM or are perceived to be in competition with one another

**Have participants suggest** from the point of view of the learner what the positive aspects of co instruction might be.

**Expected Response**

- change, variety in style and pace
- synergy producing greater enthusiasm

**Have participants suggest** what might affect the learner in a negative way.

**Expected Response**

- inconsistent messages
- interpersonal competition

OPTION: If you have time at this point, distribute the article, Paddling Together: CO-Presenting Primer and have participants read them to add to the previous discussion.

**Refer participants** to the reference materials on Co Instruction to read the list of ways suggested to avoid the disadvantages and to note the characteristics of effective co instruction.

RM

**Emphasize** the need for team building prior to working together as instructors/facilitators.

**Highlight** that the team should participate in planning activities , resolving the issue of how best to support each other and sharing personal

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

expectations and limitations.

**Explain** that the trust can develop only if there is agreement on the following:

- philosophy
- interventions
- signals
- making changes
- flexibility
- need to support each other

**State**

- the reference materials contain a tool to help those who are going to work together to get started
- this tool takes the form of a Co Facilitating Worksheet to be completed
- the tool describes a four step process to be followed

**Walk through** the process and the worksheet, noting that both issues relating to the content and the relationship of the team members are addressed.

**Clarify** any points participants present.

**Introduce Exercise:** Co Instruction as the opportunity for participants to try using the Co Facilitating Worksheet.

(NOTE: If you have individuals in the training session that are to work together, they could be paired together for this exercise and encouraged to prepare and present as co facilitators in the Performance Check of this workshop.)

PM  
PM

**Allow** 20 minutes for completion. All pairs may not have the time to actually complete their meeting but they will have had enough time to have experienced some of the discussion.

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

**Debrief** the activity by having participant report on their **discussions**.

**Ask**

How did you feel about the process?

Did you discover any similarities/differences?

What agreement did you come to, if any?

**Summarize** the teaching point.

**Emphasize** the added value of having someone providing ongoing feedback to assist you in becoming more skilled and the contribution co instruction can make to the learning process.

**Suggest** that if participants wish, they can choose to co instruct in the Performance Check of this workshop.

**State**

- throughout the lesson, you have completed a number of facilitating activities

**C.PERFORMANCE CHECK**

- your performance during these exercises serves to allow you to assess your achievement of the lesson objective

10

**Refer participants** to PM and, in plenary have them answer the two questions listed

**Highlight** the successes you observed, giving them specific examples from your observation.

PM

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**D.LESSON  
CONCLUSION**

10

**Refer** to lesson objective and the lesson outline presented in the lesson introduction.

**Review** the activities the participants were asked to complete, noting each one and the important issues related to it.

**Remind** participants that the reference material provided to them summarizes what is critical for each of the topics, and they should find it useful when they are preparing to facilitate other types of learning activities.

**Link** to the next lesson, announcing it as the lesson focusing on what we can do to create a positive learning environment and how to approach challenging situations.

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LESSON TITLE: Managing the Learning Environment

DURATION: Theory:           minutes  
                  Practical:       minutes  
                  Total: 120       minutes

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

LESSON ENABLING 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 LESSON ENABLING OBJECTIVE:

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

TRAINING AIDS

A) CODED ITEMS

Participant Manual

Instructional Techniques Reference Material

B) FORMS AND BOOKLETS

NUMBER

NAME

QUANTITY/PARTICIPANT

C) BOOKS AND MANUALS

NUMBER

NAME

QUANTITY/PARTICIPANT

D) HARDWARE AND EQUIPMENT

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**A. LESSON INTRODUCTION**

5

**1.Link**

**Introduce** lesson topic.

- this lesson deals with the management of the learning environment
- this is an important aspect of facilitating training sessions
- we will examine some of the issues associated with establishing a positive group dynamic in our classrooms

**2.Lesson Objective**

**Present** lesson objective on flip chart and leave posted for the remainder of the lesson. **Refer** participants to PM

**Have participants read** the description of the expectations of the performance check of the lesson.

**3.Lesson Outline**

**Refer** to the two topics of the lesson outline PM, briefly describing their relationship to the lesson objective.

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

**4.Motivation**

**Highlight** benefits of lesson

- allows us to think about what we can do to create the optimum learning environment
- provides opportunity to apply a model of responding to situations which we might find a challenge

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**B.LESSON BODY**

1. Managing Group Dynamics for Learning

1.1 Role as Group Leader

**Introduce** topic

RM

10

- training classrooms are made up of unique individuals
- each has an individual personality, background, values, and learning styles
- they form a group, even if only a temporary one

**Present** the three stages of group development to be found in training groups

- 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.
- there are predictable 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

1. FORMAL STAGE

2. INFORMAL STAGE

3. SELF MANAGING STAGE

RM

- each stage is characterized by typical behaviours of the group members

**Have participants refer** to the reference materials on **Managing Group Dynamics for Learning** to note the behaviours listed in the chart.

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Ask the question**

Where is our group according to the chart?

**Acknowledge** the response given and ask if others agree/disagree.

**State**

- one of the key issues always of concern to instructors/facilitators is motivation
- in order to be successful, it is necessary that both the participants and the instructor/facilitator maintain a positive attitude to the session

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**Refer participants to the Exercise: The Issue of Motivation**

**Assign** one question/or ask groups to select one of the two questions relating the factor/events affecting the motivation level.

Allow 10 minutes to complete the lists working on a flip chart.

**Have each group present** their ideas in turn.

**Debrief** results in plenary, identifying the categories of their responses as they relate to the management of

- emotional environment
- the course content /process of instruction
- physical environment

10

**Highlight** that the role of the group leader is to

RM

1. Establish and maintain climate of mutual respect and teamwork
2. Facilitate the learning activities
3. Serve as a source of information
4. Manage the physical conditions

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=	<p><b>Refer</b> participants to reference materials on the Role of Instructor /facilitator as Group Leader and suggest they <b>note their reaction/concerns</b> about the statements made as they read.</p>	RM	
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**Allow** time for reading (about 5 minutes)

**Follow up** reading by addressing the issues that are raised. If none come up, be prepared to raise your concerns or ask for examples to illustrate the points made.

1.2 Dealing with Challenging Situations

**Introduce** topic

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- no matter how much effort we put into preventing problem situations, there will still be situations that will present themselves to us
- it is important that we look at the world realistically and prepare ourselves to handle problems

	<p><b>Have participants refer</b> to the Exercise: Identifying Challenging Situations PM to list the situations they expect they might face and to describe what they would do.</p>	PM	
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**Allow** 5 minutes for completion.

**Take up results briefly** in plenary to form a list on a flipchart. **Avoid commenting** on the action they would take; just record what they report without discussion.

If you plan to deal with the teaching point, Handling Sensitive Topics, have participants examine list to see if any of those suggested fit into the category of sensitive topics.

	<p><b>Present</b> the responding model as described in the reference materials. ( Use the reference materials to guide you.)</p>	RM	
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1. Assess the situation
  - 1.1 What is happening?
  - 1.2 Why is it happening?

(Highlight the **need and value** of the individuals

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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involved)

2. Select a strategy of response
  - 2.1 Ignore the situation entirely
  - 2.2 Ignore the situation in class and acknowledge later
  - 2.3. Acknowledge the situation in class and continue as planned
  - 2.4. Acknowledge the situation in class and engage the participants by adapting the activity to suit the class

(Include examples of the options for dealing with the situations for each strategy involving taking some action.

3. Evaluate your effectiveness  
(This can only be done after the fact)

Use **one example** from the list of challenging situations and **walk through** the model assessing the situation (identifying the need expressed by the behaviour and the value of the person) and the options available for the strategies involving action.

Use questions to have participants involved in the application of the model

2. Handling Sensitive Topics  
(OPTIONAL)

**This topic is optional. Where the training package to be used by participants is likely to bring out sensitive issues, it is recommended that you include this teaching point.**

RM

20

**Introduce topic**

- in the responding model for dealing with challenging situations, the first step was to assess the situation
- in many cases, that assessment results in the acknowledgement of particular needs of the individual, often needs of a sensitive nature
- some training naturally brings up sensitive topics e.g., communication training

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- in both cases, we are required to be skilled in handling the situation so that the climate of mutual respect is maintained and the participants can continue to learn
- whenever sensitive topics/situations form a part of the facilitation, we are challenged to develop and maintain a positive rapport with the individuals as well as the group

**Have participants suggest examples** of issues which might prove to be sensitive for the training they are to be responsible for.

As participants provide their examples, **ask them why** they think they are sensitive to draw out the fact that sensitive issues are often the result of a challenge to people's values and mode of behaviour.

**Stress** that in handling delicate situations, facilitators must themselves be sensitive to the unspoken needs of participants, the needs of respect and acceptance.

FC

**Have participants suggest** what things they might do as part of their preparation to handle these areas of the course successfully.

Accept all responses and record key words on a flip chart

**Expected Answers**

- be well prepared in the sensitive content area
- try to anticipate what the sensitive issues might be
- avoid judgement when individuals are venting their frustrations and expressing their concerns
- establish climate of mutual respect i. e., set the example and avoid trying to control others and avoid embarrassing situations
- plan to set up guidelines for interaction to ensure differing opinions are both listened to and respected; respect the norm of privacy

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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- avoid trying to change values
- focus on the specific objective
- deal with conflict objectively
- encourage expression of opinion
- avoid defensive behaviour

RM

**Refer participant to the reference materials, Handling Sensitive Topics** to compare their list with those they suggested.

**Discuss** those items not on the participant flip chart to clarify understanding and to stimulate thinking about them.

For example, ask questions such as -what might the defensive behaviours be? how can we avoid them?

- what would the consequences of not dealing with conflict objectively be?

**Ask** participants to report what their concerns are and try to address them.

**C.PERFORMANCE CHECK**

**Introduce** the final exercise of the lesson.

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- you have considered what is necessary to create a positive learning environment
- you are aware of some of the challenges facing facilitators of the learning process
- this final performance check of the lesson is designed to allow you to apply the responding model to some typical challenging situations

**Refer** participants to the PM

PM

**Have participants work** in small groups or individually, assigning **one** situation to each group.

(The number of situations to be assigned is to be determined by the time available.)

**Allow** time for completion of instruction #3.(about 10 minutes)

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**Have each group present** their results in plenary. Limit discussion to 3 minutes per situation.

As each presentation is made, **confirm** the use of the responding model (steps #1 and 2) and **highlight** the sensitive issues to be considered.

NOTE: See attached suggested solutions for your information.

**D.LESSON CONCLUSION**

5

**Refer** to lesson objective and the outline presented in the introduction of the lesson.

**Have participants summarize** by asking them what is critical about managing the learning environment.

**Emphasize** that the reason managing the learning environment is an important issue is the effect that it has on the learning. As facilitators of the learning process, we must always consider what is happening to the learning.

**Link** ahead to the next segment, their opportunity to prepare and deliver a 20 minute portion of their training package.

**SUGGESTED SOLUTIONS FOR CHALLENGING SITUATIONS PM 5.5**

**1. Step #1: Assess Situation (What? Why?)**

- participant is not showing interest
- participant needs to see relevance of material
- participant needs to see himself as part of the group
- there is a lack of motivation, perhaps due to knowledge/skill level

**Step #2: Select a strategy of response**

- ignore if situation is short term and you can take it/if behaviour is not affecting others
- deal with situation by
- trying to connect, showing your respect for the participant
- referring back to an answer/comment that contributed to the class discussion
- assigning leadership role within small group

**2. Step #1: Assess Situation (What? Why?)**

- participant is trying to get attention/recognition
- participant may think he is helping
- participant needs to establish themselves as a member of the group



TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Step #2: Select a strategy of response**

- acknowledge value of individual as a source of stimulation/example of participation
- use comments that are relevant and bring comments back on topic
- reduce eye contact
- give attention to individual during exercises/breaks

**3. Step #1: Assess Situation (What? Why?)**

- participant appears to lack confidence
- participant may learn best/ prefer to learn through observation
- explanations given may not be clear to participant; material may be at wrong level

**Step #2: Select a strategy of response**

- provide opportunity where question can be answered easily
- probe answers to determine logic
- provide coaching during exercises

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**4. Step #1: Assess Situation (What? Why?)**

- participant wants attention
- participant needs challenge
- participants needs to take situation more seriously

**Step #2: Select a strategy of response**

- appreciate talent of individual and acknowledge the value of humour
- ask participant for objective/serious explanation and to support his/her ideas
- make reference to serious comments made
- speak privately to participant

**5. Step #1: Assess Situation (What? Why?)**

- participant may need recognition for expertise
- participant may require challenge
- participanat wants attention

**Step #2: Select a strategy of response**

- relate experience of participant to lesson topic
- ask participant to share expertise with examples
- redirect questions to participant

**6. Step #1: Assess Situation (What? Why?)**

- participant takes pride in being right
- participant wants to be noticed
- participant wants to help others ( serve as warning system)
- participant may be resistant to ideas presented

**Step #2: Select a strategy of response**

- anticipate reaction and acknowledge imperfection without extensive apology
- acknowledge that individual preferences and needs may differ
- provide choices whenever possible

**SUMMARY**

- avoid getting even/cutting people down
- avoid becoming personally involved

LESSON TITLE: Workshop Performance Check

DURATION: Theory:           minutes  
                  Practical:       minutes  
                  Total: 330       minutes

PREREQUISITES:

PREREADING REQUIRED:

REFERENCES FOR INSTRUCTORS:

LESSON ENABLING OBJECTIVE : N/A

EVALUATION OF LESSON ENABLING OBJECTIVE:

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TRAINING AIDS

A) CODED ITEMS

Participant Manual Instructional Techniques Reference Material

B) FORMS AND BOOKLETS

<u>NUMBER</u>	<u>NAME</u>	<u>QUANTITY/PARTICIPANT</u>
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C) BOOKS AND MANUALS

<u>NUMBER</u>	<u>NAME</u>	<u>QUANTITY/PARTICIPANT</u>
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D) HARDWARE AND EQUIPMENT

Video camera  
Video cassettes  
Play back unit in breakout room

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
A.			
<b>INTRODUCTION</b>	<b>Introduce</b> this segment of the training session		
1.Link	<ul style="list-style-type: none"> <li>- you have completed the five lessons of the workshop</li> <li>- this segment provides you with the chance to prepare and present a twenty minute portion from your training package</li> <li>- based on your observations of others and your experience and the feedback you received on your facilitation activities, you can now try to integrate what you have learned for your final presentation</li> </ul>		
	<b>Have participants refer</b> to the PM p. to read the purpose of the activity.	PM	
2.Structure of Activity	<b>Highlight the times</b> suggested for each part of the activity.		
	NOTE: Although the prep time indicated is 60 minutes, you probably will be able to stretch this to 90 minutes plus a 20 minute break.		
	<b>Inform</b> participants of how you would like to structure the day, <b>posting</b> preparation and delivery times on a flip chart.		
	<b>Describe</b> the delivery and feedback part of the activity.		
	<ul style="list-style-type: none"> <li>- each participant to present to a maximum of twenty minutes ( time cards to be held up if requested at 10 minutes, 5 minutes, and 2 minutes)</li> </ul>		
	<ul style="list-style-type: none"> <li>- participants to be filmed for viewing immediately after their presentation</li> </ul>		
	<ul style="list-style-type: none"> <li>- all participants to play the role of participants, responding as they expect their target population will respond</li> </ul>		

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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- after each presentation, a few minutes will be given for participants to record notes from their observation using provided observation checklist
- these notes are to serve as a basis for the verbal feedback
- verbal feedback session held (for a maximum of ten minutes) with the participant presenting commenting first, followed by the feedback from the participants and the course facilitator
- written notes to be given to presenters for use as they view the videotape

**Refer participants to the Observation Checklist in the PM**

**Clarify** any items that participants have questions about.

**Explain** its intended use.

- tool for observers to use as a basis for giving feedback
- participants to examine list and choose the items on which they would like to comment

**Refer participants to the Guidelines for Giving Feedback** of the reference materials on **Coaching in the Classroom**.

Consider posting those guidelines which apply to this situation on a flip chart for participants to refer to.

**Have participants make their selection** as instructed in #1.

**3.Preparation**

**Allow** participants the preparation time indicated, drawing attention to the items listed in instruction #4.

**Circulate to help** participants during their preparation.

**4.Delivery**

**Organize** a list for the order of presentation.

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

**Remind** participants of the procedure to be followed.

**Conduct** the delivery for each participant, holding up the time cards as required and making notes on the delivery.

**Allow** time for participants to make notes on card or paper using the Observation Checklist as their guide.

## 5. Feedback

**Lead the feedback session,**

- calling on the presenter to describe
  - how they felt things went
  - what they identify as their strengths
  - What they would like to do differently
- asking participants to give their feedback
  - identify what went well
  - make suggestions for change

(In collecting feedback from participants, ask them not to repeat what someone else has said, but to add new observations)

**Encourage** that the guidelines for giving feedback as outlined in the reference materials, **Coaching in the Classroom**, or those you have posted be followed.

- provide summary comments to close feedback session, highlighting successes and noting one or two areas for improvement

**Have participants give** their notes to the presenter for reference as they watch their video.

**Ask each presenter to watch** at least a portion of the videotape in the designated breakout room.  
NOTE: Some participants may wish to borrow their tape to view it again at a later date.

## 6. Debrief

**Conclude the performance check** activity by congratulating participants on their performance and demonstration of instruction/facilitation techniques.

TEACHING POINT

CONTENT/METHOD

TRAINING

TIME

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**Ask participants to comment on this activity.**

**Link your closing remarks on the activity to the Workshop Conclusion.**

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LESSON TITLE: Workshop Conclusion

DURATION: Theory:           minutes  
                  Practical:       minutes  
                  Total: 65       minutes

PREREQUISITES: Completion of workshop lessons

PREREADING REQUIRED: N/A

REFERENCES FOR INSTRUCTORS:N/A

LESSON ENABLING OBJECTIVE : N/A

EVALUATION OF LESSON ENABLING OBJECTIVE:

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TRAINING AIDS

A) CODED ITEMS

REFERENCE CODE

Participant Manual

Instructional Techniques Reference Material

B) FORMS AND BOOKLETS

NUMBER      NAME

QUANTITY/PARTICIPANT

C) BOOKS AND MANUALS

NUMBER      NAME

QUANTITY/PARTICIPANT

D) HARDWARE AND EQUIPMENT

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TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
<b>WORKSHOP CONCLUSION</b>	<b>Welcome participants to the Workshop Conclusion.</b>		2
1. <b>Intent of Conclusion</b>	<ul style="list-style-type: none"> <li>- conclusion serves to allow them to assess what they have learned and to plan for the future</li> <li>- they will have a chance to complete a course evaluation</li> </ul>		
2. <b>Course Objective</b>	<p><b>Refer to posted course objective and suggest participants assess their success in it achievement.</b></p> <p><b>Briefly highlight</b> the experiences from your point of view, identifying some of the successes you witnessed.</p> <p><b>Refer participants to their list of expectations from the workshop introduction for comments.</b></p>	FC	5
3. <b>Action Planning</b>	<p><b>Announce</b> that the Participant Manual contains an action planning exercise which will help to guide them through the process of identifying more specifically what they learned.</p> <p><b>Refer participants to PM</b> and guide them through the activity as described.</p> <p><b>Have participants report</b> a sampling of their results in plenary/to another participant/, in particular reporting what was most valuable to them.</p>	PM	25

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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4. **Continuous Improvement Through Self Assessment**

**Introduce** topic.

- the action plan will serve to get participants on the road to developing their skills as facilitators of learning
- to assist them in continuing to develop, there is a self assessment tool which they can use to help them focus on the techniques for supporting learning
- this Facilitator Self Assessment Tool is found in the Instructional Techniques Reference Material

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**Refer participants** to the topic as it is presented in the reference material, **emphasizing**

RM

- self assessment is one important aspect of becoming a member of a learning organization
  - the self assessment is best done immediately after delivering a session
  - it can be combined with the feedback received from participants and observers or co instructors
- Walk through** the tool itself, **noting** the following:
- there are four sections dealing with the learning climate, the course delivery, instructional techniques, and general questions
  - the ratings are entirely for their personal use and, if used appropriately, should assist them in identifying the areas they would like to concentrate on
  - the tool is to serve them in seeking the assistance they require, in helping them set both long and short term goals for improving the quality of their performance

TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Describe** the Training and Development support and coaching available to them.

**Provide** participants with a contact name. If appropriate, distribute your business card and encourage them to contact you with their concerns.

**Have participants refer** to the Exercise: Exploring Self Assessment PM to make notes on using the Instructor/Facilitator Self Assessment Tool.



TEACHING POINT	CONTENT/METHOD	TRAINING	TIME
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**Tell** participants that you look forward to hearing from them after they have conducted their first session. Say farewell!

1/8/00