Training of Trainers
Presentation and Facilitation Skills
Participant Guide

December 2001

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Introduction

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Introduction

Overview

This Training of Trainer/Presentation and Facilitation Skills Course is designed to help trainers effectively deliver courses. Effective delivery of training courses ensures that the courses are worth the time of the trainer and participants.

The following should be considered for effective training delivery:

- ♦ Learning styles.

- ♦ Adult learning principles.

- ♦ Presentation and facilitation skills.

- ♦ Effective group interaction and communication skills.

- ♦ Meeting the needs of a specific audience.

- ♦ Course evaluation.

Learning Objectives

At the completion of this course, you will be able to:

- ♦ Describe and recognize three learning styles.

- ♦ Incorporate knowledge of learning styles into training delivery.

- ♦ Describe the principles of adult learning.

- ♦ Recognize the importance of understanding adult learning principles.

- ♦ Incorporate knowledge of adult learning principles to maximize training delivery effectiveness.

- ♦ Make effective training presentations.

- ♦ Effectively facilitate training classes.

- ♦ Facilitate group interactions and communications in training classes.

- ♦ Adapt training to the needs of the audience.

- ♦ Evaluate training effectiveness.

Class Participation

The goal of this course is to provide knowledge and skills that will make you an effective trainer. Throughout this course, you will be asked to complete numerous exercises (or activities). In order for the exercises to be meaningful and provide practice of the skills that you need to perform training tasks, you must actively participate in the activities. If any of the information presented is unclear, you should ask questions, or ask for further explanation of the concept or skill.

At this time, please write a goal for what you want to achieve in this course:

_____

_____

_____

_____

Summary

In this module, you learned to:

♦ The purpose, objectives and priorities of the Training of Trainers/Presentation and Facilitation Skills Course.

♦ The importance of participating in this class.

The information that you received in this module should ensure that the rest of the course is meaningful to you.

Module 1:

Learning Styles

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MODULE 1: LEARNING STYLES

Learning Styles

Overview

People learn best in various ways. Learning styles indicate the most effective methods of instruction for various types of learners. When developing training content and delivery methods, recognizing these differences enhances the effectiveness of training.

Three distinct learning styles are:

- ♦ Visual.

- ♦ Auditory.

- ♦ Kinesthetic.

Although everyone learns in all styles, each person has one ***dominant*** learning style. ***Visual*** learners absorb more from material they see, ***auditory*** learners from material they hear, ***kinesthetic*** learners from doing or performing a task.

Learning Objectives

Upon the completion of this module, you will be able to:

- ♦ Describe and recognize three learning styles.

- ♦ Incorporate learning style knowledge for maximum effectiveness of training delivery.

Exercise: Assessing Learning Styles*

* Adapted from <u>Accelerated Learning</u>, Colin Rose, 1987.

Instructions:

1. For each question in the left column, circle one answer from column A, B or C that describes what you usually do.

2. When you have completed the assessment, wait for the instructor to explain the assessment before reading further in the material.

When you…	A	B	C
Spell, do you…	try to see the word?	use phonetics?	write the word down to find whether it "feels" right?
Visualize, do you…	see vivid, detailed pictures?	hear associated sounds?	have images that involve movement?
are concentrating, do you…	get distracted by untidiness or visual stimulus?	get distracted by sounds or noises?	get distracted by movement?
are angry, do you…	become silent?	express it verbally?	run off, grit your teeth and clench your fists?
Forget something, do you…	forget a name and remember the face?	forget a face and remember the name?	remember what you or someone else did?
Talk with people, do you…	talk sparingly and dislike listening for too long?	enjoy listening; however, feel impatient to talk?	gesture and use expressive movements?
Contact people for business reasons, do you…	prefer direct, face-to-face, personal meetings?	prefer talking on the telephone?	talk with people while walking or participating in an activity?
Read, do you…	like descriptive scenes or pause to visualize the actions?	enjoy dialog and conversation or "hear" the characters speaking?	prefer action stories?
Learn new information, do you retain the most by…	seeing pictures that explain the concept?	hearing a lecture?	doing a case study?
Attend a class, do you…	enjoy activities that involve pictures?	enjoy activities that involve discussion with other participants?	enjoy activities that involve performing a task or making something?

Scoring the Assessment

1. Count the number of circles you have in each column. Record those numbers below.

A. _____ B. _____ C. _____

2. The column that had the most items circled indicates your dominant learning style.

3. The columns correspond to the learning styles in the following way:

> Column A = Visual
>
> Column B = Auditory
>
> Column C = Kinesthetic

Exercise Summary

As you think about how you learn, what clues can you identify in your personal behavior that indicate whether you are an auditory, visual, or kinesthetic learner?

A study of 5,300 participants compiled by Specific Diagnostic Studies of Rockville, Maryland, U.S.A., identified the following breakdown among the learning styles, which are believed to be representative of the general population:

- ◆ Visual - 29%.

- ◆ Auditory - 34%.

- ◆ Kinesthetic - 37%.

Although each person normally has one dominant learning style, each of us learn in all three ways. A small number of people learn just as easily using any of the three styles. How well we use our non-dominant style varies with each individual. Trainers should recognize the various styles and present material to stimulate all three styles. The following descriptions of the three styles of learners help you plan appropriate learning activities.

Visual Learners

Visual learners prefer seeing or reading material. These learners respond well to pictures and illustrations of the material. They need step-by-step charts with pictures of the procedures or process being learned. Therefore, operation manuals that come with equipment typically have pictures as well as written directions. These materials work well for visual learners.

Visual learners often prefer reading, seeing a play or paintings. They may write remarks of praise on a subordinate's work rather praising them verbally. They look at facial expressions to determine a person's mood and often doodle (draw or sketch) when waiting or bored.

Posters with words or colorful writing on a flipchart are good ways to stimulate learning for the visual learner. These participants appreciate creative pictures or illustrations that accompany key words on flipcharts or transparencies. These participants also respond well to video presentations if the content is lively, colorful and animated.

The trainer can often determine whether a participant is a visual learner from his/her choice of words. Visual learners use words that make one think of pictures, color, words, or illustration. Visual learners might say things like:

- ♦ "That **looks** good to me."

- ♦ "I need to get that in **perspective**."

- ♦ "I **see** now." (Meaning, "I understand.")

Exercise: Visual Learners

Instructions:

1. Work with your group to complete the exercise.

2. In the first set of blanks, list five ways a trainer can determine whether a participant is a visual learner.

3. In the set of blanks on the next page, list five ways that a trainer can stimulate a visual learner.

How a trainer can tell someone is a visual learner

1. _____

    _____

2. _____

    _____

3. _____

    _____

4. _____

    _____

5. _____

    _____

How to stimulate visual learners

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

Auditory Learners

Auditory learners like to hear presentations or talk out problems. Lecture is typically an effective learning method for these participants. Audiotapes are also a good learning tool for these participants.

Listen for indications that a participant is an auditory learner. These participants often use words associated with sound, listening, hearing, or something that makes a noise or sound. They often say things like:

- "That **sounds** great."

- "**Listen** to me."

- "I'm **listening**."

- "I can just **hear** how…"

- "Something **tells** me…"

Typically, auditory learners like to talk with people, prefer to listen to the radio and enjoy music. When praising someone they give verbal praise rather than writing a note. When trying to determine someone's mood they listen to the tone of voice. These learners prefer verbal instructions to written instructions.

These participants can learn effectively from audiotapes. They learn from discussions with other participants, as well as lectures from the trainer. Video presentations work well also, and the presentations do not have to be as visually stimulating as for visual learners. These individuals learn from talking, teaching, reading out loud and presenting.

Exercise: Auditory Learners

Instructions:

1. Work with your group to complete the exercise.

2. In the first set of blanks, list five ways a trainer can determine whether a participant is an auditory learner.

3. In the set of blanks on the next page, list five ways that a trainer can stimulate an auditory learner.

How a trainer can tell someone is an auditory learner

1. _____

    _____

2. _____

    _____

3. _____

    _____

4. _____

    _____

5. _____

    _____

How to stimulate auditory learners

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

Kinesthetic Learners

Kinesthetic learners absorb new information by doing, moving and participating. These participants like action and are bored by just reading or listening. They are usually not good at learning from audiotapes or lectures. If they have to sit too long without moving the trainer loses their attention.

What words and phrases can you expect to hear from a kinesthetic learner? These learners often use words that convey action, movement, a sense of touch or feeling, and involvement. They say things like:

- ♦ "That **feels** right."

- ♦ "I **feel** that..."

- ♦ "It's a **tough** problem."

- ♦ "I have a **firm** grip on the subject."

- ♦ "It's difficult to **handle**."

Talking while walking or performing another activity is indicative of this student. They also may prefer to play sports or games, enjoy dancing, and reward someone by giving a pat on the back. When trying to interpret someone's moods they watch body movements. When they are inactive, they tend to fidget (move around).

Kinesthetic learners respond well to group activities with a variety of activities. Some examples of how they might learn include:

- ♦ counting the money.
- ♦ writing the answers.
- ♦ simulating the skill, like practicing a presentation.

They begin a task without reading the instructions. Activities that require these learners to physically move, maximize learning. They understand the deeper meaning or content through a physical activity. Do not expect them to read and be able to learn a task. They must perform the task to understand it.

Exercise: Kinesthetic Learners

Instructions:

1. Work with your group to complete the exercise.

2. In the first set of blanks, list five ways a trainer can determine whether a participant is a kinesthetic learner.

3. In the set of blanks on the next page, list five ways that a trainer can stimulate a kinesthetic learner.

How a trainer can tell someone is a kinesthetic learner

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

How to stimulate kinesthetic learners

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

Importance of Recognizing Learning Styles

As a trainer you want each participant to get the maximum benefit from your course. You need to recognize and consider learning styles when creating or teaching a course. Without recognizing that individuals have different learning styles and offering a variety of ways to learn material, a trainer tends to teach from her/his own learning style.

In other words, if you are an auditory learner you might naturally assume that all participants benefit from lecturing, while kinesthetic participants might easily lose interest. If you are a visual learner you may ask participants to read and write frequently, and lose the interest of the auditory learner. A kinesthetic trainer might exhaust visual and auditory learners with an overabundance of activity.

Offering participants an opportunity to learn in their own style is essential to creating the most positive learning atmosphere. How you present something is as important in the learning process as the content presented. As a trainer you must develop your skills to integrate all three styles of learning into your instructional process. You must also be able to recognize when a participant is not absorbing the material so you can adapt and facilitate learning.

Exercise: Activities that Support Learning Styles

Instructions:

1. Match the following list of activities to the learning style the activity supports.

2. On the line beside the activity write Visual, Auditory or Kinesthetic.

Activity/Characteristics	*Learning Style*
1. Trainer writes words on a flipchart.	_____
2. Trainer plays an audiotape.	_____
3. Participants act the parts of a Shakespearean play.	_____
4. Participant demonstrates how to count money.	_____
5. Participants create symbols that correspond to key words.	_____
6. Participants create songs to recall information.	_____
7. The walls of the classroom have colorful posters.	_____
8. Participants take notes about the presentation.	_____
9. Training material contains pictures showing how to operate machinery.	_____
10. Trainer lectures.	_____

Exercise: Training Strategies for Learning Styles

Instructions:

1. Read the exercise information below.

2. Work with your group to complete the questions on the following page.

You are a new trainer at the "Institute of Banking and Finance" assigned to train a new group of bankers on Letters of Credit. The topics you are responsible for are "Letters of Credit, Trade Finance and Uniform Customs and Practice for Documentary Credits." In your first class, three students in the class are Nina, Joseph and Angela.

Nina walks into the classroom first. She greets you then walks to the window and gazes out at some workers repairing a building across the street. She asks what she can do to help you prepare for the class. During your discussion with her she says that she feels she will do well in the class since she had a good experience in this field, during her employment at Bank of Ghana.

Joseph comes in next. He has a magazine under his arm. After shaking your hand he changes seats a couple of times before he chooses a place. He sits down and starts looking at the pictures in the participant guide on his desk. You ask him if he has had any experience on this topic before. He says no, but he would like to see how well he does in the class.

Angela walks in and doesn't even see you standing by the door. She seems to know Joseph and starts talking to him immediately. She is angry because of the price she had to pay for a cassette recording of the "Voices of Africa" concert. "Listen, you've got to hear what happened to me!" she says, "Last week I went to the concert "Voices of Africa". This morning I went to the store to buy the new recording, and they said the price has doubled since the last time I bought a cassette." Angela talks a lot about the incident then asks Joseph if he has heard the wonderful new production.

Nina

What is her learning style?

_____

What training strategies would you use for Nina?

_____

_____

_____

_____

Joseph

What is his learning style?

_____

What training strategies would you use for Joseph?

_____

_____

_____

_____

Angela

What is her learning style?

_____

What training strategies would you use for Angela?

_____

_____

_____

_____

Summary

In this module, you learned about three distinct learning styles and how those styles can be incorporated into effective training techniques.

In this module, you learned:

♦ To recognize three learning styles.

♦ How to incorporate learning style knowledge for maximum effectiveness of training delivery.

Using your knowledge of these styles helps you deliver effective and useful training.

Module 2:

Adult Learning

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Overview

Instruction of adults requires unique techniques. Adults have a wide variety of experiences and responsibilities. Time, business and family duty pressures may hamper an adult's commitment to spending time and energy in a training class.

The effective trainer considers each participant as an individual with valuable and varied experiences, opinions, abilities and goals. Adult learners require respect for their abilities and experiences.

When teaching adults, a number of issues should be considered including the setting, teaching methods, credibility of the instructor, and learning application.

Learning Objectives

Upon the completion of this module, participants will be able to:

- Describe principles of adult learning.

- Recognize why it important to understand and use adult learning principles.

- Incorporate knowledge of adult learning principles to maximize the effectiveness of your training delivery.

Exercise: Adult Learning Research

Instructions:

1. Work with your group to complete this exercise.

2. Using the categories listed on the following page, list things, in your own experience, that have assisted you in learning and things that have been barriers to your learning. You should have items that assisted you and barriers for each category.

3. Record the results of your group's discussion on a large piece of flipchart paper.

4. Choose a spokesperson to present your information to the rest of the class.

5. Advise your instructor when your group is finished.

Category	Assisted Learning	Barrier to Learning
Your Need to Learn (Relevant to Your Goals)		
"Comfortable" learning atmosphere		
Instruction Methods		
Content		
Miscellaneous		

Desire to Learn

Adults must have a desire to learn before learning can take place. In order for an adult to be motivated to learn the following criteria should be met:

♦ Course relevance to an adult's goals.

♦ "Comfortable" learning atmosphere.

♦ Respect for participant's life experiences.

♦ Participant's feeling of maintaining control of learning.

Course Relevance to an Adult's Goals

Adults learn what they *need* or *want* to learn – unlike children who like to learn almost everything. The instructor should continually relate course content to the "real world" of the adult learner.

Due to the many pressures facing adults, whether family, business, or social, adults must feel that attending and participating in a course gives them information they can use.

The instructor can establish relevance for learners by asking them to list their desired outcomes for the course and posting the participants' objectives on a flipchart. As objectives are met the instructor can note that accomplishment. An instructor might say:

> *"Eric, you said on the first day of class that you wanted to learn more about collateral valuation. Did the module we have just completed help you meet that goal?"*

At end of the course, review the list of the participants' objectives. Determine if each has been met by the course. Explain how the participant might resolve any issues that have not been addressed in class.

"Comfortable" Learning Atmosphere

Adults are motivated to learn in an atmosphere where a wrong answer or incorrect demonstration will not be negatively judged. Adults are sensitive to the judgment of their peers. Learning does not take place when adults are criticized or made to feel inferior for incorrect answers or opinions that are not in agreement with the course content.

The instructor's reaction to incorrect answers or contributions from participants establishes the basic atmosphere of the learning environment. Responses should be positive, yet provide feedback to learners. For example, a supportive response to an incorrect answer might be:

> *"That's right in some cases, in this situation you will notice that..."*

> *"I can understand how you came to that conclusion. Did you consider..."*

The instructor should direct and control responses of participants toward each other. Responses among participants should be supportive rather than destructive. Peer groups can destroy a positive learning atmosphere.

Respect for Participant's Life Experiences

The adult learner comes to class with a wide variety of experiences, both personal and professional. The instructor should respect the learner's life experiences and relate the learning topics to those experiences.

If the instructor assumes that the participants do not know much, are less experienced or educated than the instructor, those attitudes have a negative affect on the learning environment. The participants receive a message of disrespect from the instructor, and learning is diminished.

The instructor should always be respectful of the adult learner's background. Instructors can show respect by asking particpants' opinions, allowing participants to answer, and offering positive responses when the learner shares experiences.

A component of respect is inclusion. Adults need to feel included as an equal in the group. The instructor can accomplish this by drawing each learner into discussions, rotating volunteers and attempting to give each participant equal attention.

Maintaining Control of Learning

Adults like to have as much control as possible. Asking the group to make simple decisions like when to take a break or lunch indicates that the participants have a partnership with the instructor. Forcing adults to adhere to rigid rules can be a barrier to learning.

An instructor can signal that learners have some control by allowing them to make decisions about:

♦ Which students will be in their small group for an activity.

♦ Where to sit (unless you have a sound instructional reason for assigned seating).

♦ Where to post information on flipcharts.

Whenever possible, allow the group either to make a decision or participate in discussion.

Participation

Adults learn best when they can participate in the learning. Participation assists all learners regardless of his/her learning style. Their participation contributes to their commitment to learn something from a course.

Consider that students generally remember:

♦ 50% of what they hear and see.

♦ 70% of what they say.

♦ **90% of what they do <u>and</u> talk about**.

Active participation in the learning process ensures that participants gain and retain the most information from class.

Exercise: Methods for Class Participation

Instructions:

1. Work with a partner to complete the exercise.

2. In the space provided below, record some ways that learners can participate in class to enhance learning.

Methods of Class Participation

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Self-Discovery

Strong programs allow participants to discover answers for themselves. Self-discovery differs from participation in that participants may be asked to do an activity prior to having content presented. With self-discovery, participants draw from their own experiences and knowledge to create new learning.

For example, an instructor might provide a self-discovery experience for a course in audit procedures. The instructor could arrange for participants to experience an audit prior to attending the course, assign specific topics for the participants to explore, and allow them to share what they have learned about auditing at the beginning of class.

Exercise: Self-Discovery

Instructions:

1. Explain an incident in which you discovered or learned something on your own.

2. Your presentation should be no more than one minute in length.

3. To prepare for your presentation, answer the following questions:

♦ How long ago was the experience?

♦ What was the experience?

♦ How much of the information did you retain?

Early Accomplishment

Adults should experience positive accomplishment early in the training. The instructor can create this opportunity by offering a simple task in the first hour of training and providing positive feedback to the participants for accomplishing the task.

Accomplishment early in training creates a positive atmosphere that is conducive to adult learning. This atmosphere reduces anxiety for adults who are concerned about their ability to learn new information or to perform in a classroom setting especially among higher ranking participants. Therefore, the instructor needs to provide opportinities for *everyone* to participate and *succeed* early during the class.

Early accomplishment also provides an opportunity for the instructor to demonstrate positive feedback. Observing that the instructor is open, positive, and provides supportive feedback allows the adult learner to begin to relax and be receptive to learning.

Positive Reinforcement

The instructor should provide positive reinforcement throughout the course to provide ongoing motivation for learning. All learners like to be told they have done good work or have given a correct answer.

Adult learners must know they are proceeding correctly through the course to prevent anxiety concerning their performance, which detracts from the learning process. Positive reinforcement confirms that the participant is progressing appropriately.

The instructor communicates positive reinforcement through voice tone, enthusiasm and choice of words. Voice tone should communicate the same message as the words. Few words with a great amount of enthusiasm are far more motivating than lengthy praise given in a monotone.

The instructor gives positive reinforcement to individuals and to the whole group when appropriate. During each exercise thank each person or group for their contributions. At the end of each module, the instructor summarizes the accomplishments of the groups and praises them for what they have learned.

Exercise: Positive Reinforcement

Instructions:

1. In the space provided below write at least seven responses an instructor can give as positive reinforcement.

2. When you have completed your list, give one verbal positive reinforcement to a member of your class concerning something you have observed him/her doing in class.

Positive Reinforcement Responses

1. _____

   _____

2. _____

   _____

3. _____

   _____

4. _____

   _____

5. _____

   _____

6. _____

   _____

7. _____

   _____

Cultural Differences

Cultural differences affect the manner that participants learn and methods the instructor uses. In some cultures individuals do not respond well to public positive reinforcement, and they prefer those remarks be given in private. In other cultures, debate with the instructor is not appropriate.

When cultural differences are not considered, a barrier to learning can be created. Understanding of customs, acceptable practices and traditions must be part of the instructor's expertise.

Exercise: Adapting Training to Cultural Needs

Instructions:

1. Work with your group to complete this activity.

2. Make a list of actions you must take in your classes to adapt instructional activities to cultural needs.

Actions to Adapt Training to Cultural Needs

♦

♦

♦

♦

♦

♦

♦

Exercise: Applying Adult Learning Principles to Training

Instructions:

1. Consider the teaching assignments you have in the near future.

2. In the space provided, record ways you will apply the Adult Learning Principles presented in this chapter.

3. Be prepared to present your findings to the class in a five-minute presentation.

Application of Adult Learning Theories

Facilities

Trainer Credibility

Participation

Self-Discovery

Early Accomplishment

Positive Reinforcement

Feedback

Life and Work Experiences Affect Adult Learners

Pattern of Learning

Cultural Differences in the Classroom

Summary

In this module, you learned principles of Adult Learning and how those principles can be applied to make training more meaningful.

You learned to:

♦ Principles of adult learning.

♦ Why you need to understand and use adult learning principles

♦ How to incorporate knowledge of adult learning principles to maximize training delivery effectiveness.

Applying adult learning principles to the design and delivery of training ensures that your classes are effective and interesting to participants.

Module 3:

Presentation Skills

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Presentation Skills

Overview

Presentation skills are as important as the content being presented. If you have ever attended a class where the instructor spoke in a monotone, failed to use visual aids, was ill-prepared or did not interact well with participants, you can understand how important presentation skills are.

In this chapter you learn methods for preparing for and delivering a training class, and how to use training tools like visual aids to enhance your presentations.

Learning Objectives

Upon the completion of this module, you will be able to:

♦ Describe effective presentation techniques.

♦ Recognize how presentation skills affect learning.

♦ Use audio/visual aids to enhance presentations.

♦ Incorporate knowledge of presentation skills for effective training delivery.

Facilities

Adults must have adequate facilities to promote learning. Inadequate facilities can be a barrier to effective adult learning. The adult student is easily distracted by discomfort, so adequate facilities including seating and lighting can have an affect on how well they can focus on learning. Adults need easily accessible bathrooms, snacks, breaks, and smoking areas.

The instructor should ensure that facilities meet the needs of the adult learner as much as possible. How an instructor sets up the tables and chairs also affects the facility's usefulness to the learner. If possible, arrange tables and chairs so each participant can see the instructor and most of the other participants. This arrangement encourages more discussion and interaction among participants.

Exercise: Facilities Checklist

Instructions:

1. With your group, develop a checklist of items that an instructor should consider when choosing or setting up a classroom.

2. Consider your past experiences as a learner in order to help you think of all the items that would create a positive learning atmosphere.

Facilities Checklist

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Making a Favorable Impression on Participants

Making a favorable impression on participants early in the training session sets the tone for the entire training class. The relationships between the instructor and participants and among participants are important elements required for learning. Building friendship and trust with participants begins the minute they enter the classroom and continues throughout the training.

Establishing Friendship and Trust

The instructor should immediately establish friendship and trust with participants as they arrive at class. A well-prepared classroom allows time for the instructor to greet participants as they arrive. Shake participants' hands, or use another appropriate greeting. Make the participant feel comfortable with casual conversation. Using the participant's name helps him/her feel important.

Appearance

The instructor should be neat, clean and well groomed. Clothing should be appropriate for the situation. In general, an instructor should be clothed in a manner a little more professional than the participants. Instructors should maintain dignity and the authority in the classroom.

Enthusiasm

The instructor should be enthusiastic and energetic. Demonstrate eagerness about sharing content with participants.

Gestures

Gestures should be positive and appropriate for the situation. Hand gestures should enhance the presentation rather than detract from it. Instructors must avoid distracting gestures such as playing with keys in a pocket or a playing with a marker while presenting.

Eye Contact

Instructors should make eye contact with participants during the initial introductions and throughout the presentation. Eye contact is a way of connecting with individuals that supports the learning process, and helps the instructor determine whether a participant understands the content being presented.

Posture

Good posture communicates confidence to participants. Slouching, leaning against a wall for support, or grasping a podium can be distracting to learners. Stand straight with shoulders back to present a confident image.

Names

Using the participants' names during initial introductions and when addressing them during the class continues to build friendship and trust with the learner.

Trainer Credibility

The trainer's credibility affects how well adult learners receive information presented in training. Adult learners may have the tendency to question whether the instructor knows enough to be teaching the class.

Adult learners want to know that the trainer has sufficient knowledge and experience to teach the course. They do not want a person teaching who has less knowledge about the subject than they do. Adult learners value years as well as quality or depth of experience that relates to the content being presented. An instructor could have 20 years of experience in an area *not* related to the topic being presented, and gain no credibility with participants.

Instructors should explain their background at the beginning of training to build a foundation of trust and respect from the participants. Building this foundation enables participants to view the instructor as credible on the subject, which enhances their learning experience.

As instructors lead the class, they gain respect from participants by building trust and respect with participants and adequately preparing for class. The relationship established between the instructor and participants and among participants in the class is key to the success of the class.

The instructor's physical appearance should not distract learners. If the instructor is not neatly groomed or acts tired and slouches, learners may be distracted.

A positive attitude, high energy, voice tone, choice of words, facial expressions, and gestures can positively support the appearance of the instructor. Conversely, a negative attitude toward learners, low energy, poor voice tone and choice of words can create a poor learning environment and detract from the trainer's credibility.

Exercise: Trainer Credibility

Instructions:

1. Work with your group to complete this exercise.

2. Read the sentences below and determine whether the statement is *true* or *false*.

_____1. Elizabeth has worked in the banking industry for two years as a teller. She will be a credible instructor for banking executives in a management class.

_____2. Adult learners want to know that the instructor has the experience and knowledge to adequately teach a topic.

_____3. Daniel is a new instructor. He cannot afford to buy a new wardrobe for training; however, he always is neat and well groomed. The fact that his clothes are not brand new will not interfere with his credibility as a trainer.

_____4. Slouching while teaching a class will not be noticeable to participants.

_____5. Peggy is scheduled to train a class of airline pilots who fly the Boeing 747. Peggy has been flying the same plane for five years and flew supplies for troops in several recent military maneuvers. She has successfully piloted two 747s that required emergency landings due to equipment malfunctions. Peggy will have sufficient credibility to teach the class.

_____6. A positive attitude and high energy positively affect the credibility of an instructor.

_____7. An instructor who feels, looks and acts tired while teaching a class does not affect learning in the class.

_____8. An instructor should explain how his/her background and experience supports his/her ability to teach a topic.

_____9. The instructor can gain credibility with participants by building friendship and trust with them and being prepared for class.

Preparation

Preparation is essential for good presentations and can alleviate the instructor's feelings of nervousness concerning the delivery. Thoroughly studying the participant's material, leader's notes, handouts, exercises, and learning activities ensures that the trainer makes an effective delivery.

Practicing the presentation helps the instructor's confidence concerning the content of the training. Practicing in front of a mirror, videotaping, or tape recording allows the instructor to practice, evaluate the delivery and make improvements. New instructors should practice at least three times.

Arrive at the training site early so you can check facilities and audio/visual aids in advance. Make sure all equipment is working. Prepare necessary flipcharts, posters or boards. Arrange back-up plans in case equipment fails to operate correctly.

Choose a room arrangement that is conducive to the type of content and activities included in the course. Adjust seating arrangements during the class to accommodate activities like small group exercises.

Make notes about the presentation prior to class to help you deliver the information.

Effective Audio/Visual Aids

Audio/visual aids enhance learning because they enable the instructor to create an interesting visual or audio focus for participants. Communicating content using audio/visual aids increases the retention of the material and supports the various learning styles.

When using audio/visual aids, consider visibility, clarity and simplicity. Participants should be able to view the aid from any seat in the classroom. The information on the aid should be clear and readable. Keeping the information simple, using key words or short phrases with blank space, assists the participants in reading and remembering the material.

Some useful audio/visual aids include:

♦ Flipchart (easel pad and stand).

♦ Overhead transparencies.

♦ Erasable board.

♦ Audiotape.

♦ Videotape.

Flipchart

A flipchart is a large pad of paper set on or attached to an easel. The instructor can write on the chart to emphasize key points while talking to the class or prepare chart pages prior to class. Participants can use flipcharts pages to make presentations as required by some of the activities.

Completed flipchart sheets may also be posted around the room as a reminder of information to reinforce learning.

Guidelines concerning flip charts include:

♦ Use colorful markers to highlight information. Vary colors for emphasis; however, do not use too many colors.

♦ Do not talk and write simultaneously. Write, then turn to talk to the group.

♦ Write key words or phrases only.

♦ Ask participants to assist by writing for you. This activity reinforces learning.

♦ Do not write too much on each page. "White space" highlights important information.

♦ Print neatly and use large letters so those participants in the back of the room can easily read the chart.

♦ Keep a blank sheet between pages of written material so that writing the next page doesn't show.

♦ Make tabs on flipchart pages to assist you in finding topics in your presentation. Other ways to mark topic are to fold a lower corner of the page, or place a piece of tape or a paperclip on the side of the page.

Overhead Transparencies

Pre-prepared transparencies and blank ones used to record ideas as an instructor presents can increase the effectiveness of a presentation. Blank transparencies can be used like flip charts are used, to record ideas solicited from participants.

Some ideas for using overhead transparencies and projector include:

♦ Ensure that you know how to operate the projector prior to class.

♦ Ensure you have an extra bulb in case one burns out during the presentation.

♦ Focus the projector properly before class.

♦ Have prepared transparencies numbered and in order for the presentation.

♦ Place the transparency on the projector before talking.

♦ Change transparencies so that they correspond with the subject being taught.

♦ Turn the projector off when a transparency is not in use.

♦ Align transparencies on screen straight so that all the text is readable.

♦ Ensure that all participants can clearly view the screen.

Chalkboard/Erasable Board

Chalkboards can be useful tools; however the chalk can be messy for hands and clothing.

When using chalk, use colored chalk for more emphasis of concepts. Erasers should be clean so that they are useful in class. Erasable boards (whiteboards) are used with erasable colored markers.

Audiotapes

Audio players or tape recorders can be used in the following ways:

♦ Participants can record presentations and replay the tap for evaluation. This technique is a good tool for teaching communications skills since participants learn a great deal from self-evaluation.

♦ Play an example of how an interaction with an employee or customer should sound.

Videotapes

Videos can be used to demonstrate skill to participants or impart other types of content. Videos should be short (no more than 20 minutes). Video cameras can be used to film participants' skill practice sessions so that they can self-evaluate their skills.

Voice

The instructor's voice can serve as a tool in the learning process. An instructor can improve voice delivery quality by listening to his/her voice on a tape recorder. Voice qualities to evaluate and improve are described below.

Tone

The tone of the voice comprises 38% of the message communicated to others. A high-pitched tone can be bothersome to listeners. A lower resonant-sounding voice is easier for people to understand. Nasal and monotones can cause listeners to lose interest in the subject being presented. Tone of voice can be used for emphasis and to elicit responses from participants.

Pace

Pace refers to how rapid or slowly a presentation is delivered. Participants are not able to understand the message fully if delivered too rapidly. Slow speech bores and encourages mental wandering. Pace should be steady, of medium speed, and slowed or accelerated for emphasis.

Clarity

Words must be enunciated, not slurred or missing ending consonants. The audience may not understand slang or colloqualisms, so they should be avoided.

Inflection

Inflection is used for emphasis and for variety to the tone and pace of the voice. Learn to use inflection to improve communication. Meaning can be changed with voice inflection as indicated below. Notice that when the emphasis is place on the word that is bolded and underlined, the intent of the sentence changes.

<div align="center">

*<u>**I**</u> want that money.*

*I <u>**want**</u> that money.*

*I want <u>**that**</u> money.*

*I want that <u>**money**</u>.*

</div>

Grammar

Proper grammar gives an impression of knowledge and confidence that the participants can respect. Participants lose respect for an instructor who uses improper grammar. Practicing your presentation prior to class helps you ensure that you use proper grammar in your presentation.

Presentation Tips

The following are ideas for making good presentations.

- ◆ *Dress comfortably and appropriately*. Avoid giving a presentation wearing clothes in which you are uncomfortable or feel unattractive. Wear your most attractive, professional and comfortable attire.

- ◆ *Use your own style*, rather than copying other speakers. Think of a dynamic speaker that you admire. You might want to adopt some of his/her techniques, without imitating the speaker. Rely on your own personality to project an interesting and unique image.

- ◆ *Vary activities* approximately every twenty minutes, since this is participants' typical attention span.

- ◆ *Face the audience* when speaking. When writing on a flipchart, stand so that participants can see what you are writing, then turn and speak to them. When using an overhead, face the audience as you review the content on the overhead.

- ◆ *Calm your nerves* prior to speaking. Try a relaxation technique by taking a few deep breaths from the diaphragm. Breathe through the nose, hold the breath for a count of three, exhale through the mouth. Repeat this 10 times. Also do some quick, simple exercises such as neck and shoulder rolls. This exercise normally relieves last-minute tension.

- ◆ *Breathing.* Before addressing an audience, take some deep breaths to ensure that your voice sounds strong and that you have plenty of oxygen.

Characteristics of an Effective Public Speaker

The work below is from <u>Communicating at Work,</u> 1993, Tony Alessandrea, Ph.D, and Phil Hunsaker, Ph.D. This list can help you form your style as a presenter.

An effective public speaker…

♦ Understands the needs of his audience.

♦ Attempts to meet those needs as effectively as possible.

♦ Is the expert on his subject and has breadth of knowledge in other areas.

♦ Constantly grows and improves in his understanding of his areas of expertise and his ability to present his material effectively.

♦ Is enthusiastic about his subject and sincere about conveying his message to the audience.

♦ Has a pleasing voice and appearance.

♦ Uses examples, illustrations, analogies, and stories to make information more interesting and exciting.

♦ Paces the program to keep it lively and interesting.

♦ Uses an appropriate level of humor and drama.

♦ Encourages group involvement and participation.

♦ Makes information as practical as possible, telling people how to use the information.

♦ Uses depth and breadth of knowledge to answer a broad range of questions thoroughly.

♦ Admits when he does not know the answer to a question, but offers to research the answer and relay it to participants. He may ask other participants if they know the answer.

♦ Helps listeners understand and retain information through the use of attention-getting verbal and visual devices such as repetition, graphics, and audience participation.

Final Exercise: Making a Presentation

Instructions:

1. Prepare a five-minute presentation to present to the class.

2. Review the Presentation Skills chapter to help you prepare your presentation.

3. The class members will review and give feedback on how well you demonstrate the skills outlined in this chapter.

4. Use the form below to evaluate each presenter.

Presentation Evaluation Form

Use a rating scale of 1 – 6 to rate the instructor you observe. 1 = lowest score, 6 = highest score.

____ Instructor was well prepared

____ Made a Favorable Impression

____ Established Friendship and Trust

____ Appearance

____ Enthusiasm

____ Gestures

____ Eye Contact

____ Posture

____ Use of names

____ Depth and breath of knowledge

____ Use of Audio/Visual aids appropriately supported presentation

____ Followed rules of visibility, clarity and simplicity for aids

____ Tone of voice appealing

____ Pace appropriate

____ Clarity of voice

____ Inflection used for emphasis and variety

____ Good grammar used

____ Listening skills demonstrated

Involved participants by:
____ Asking questions or opinions

____ Creating activities that involve participants

____ Creating self-discovery situations

____ Varying activities to capture attention of audience

____ Facing the audience when speaking

____ Appearing calm and confident

____ **TOTAL POINTS**

Other Comments

Summary

In this module, you learned the importance of presentation skills to the success of your training classes. You learned to:

♦ Effective presentation techniques.

♦ How presentation skills affect learning.

♦ How audio/visual aids can enhance presentations.

As you constantly improve your presentation skills, participants enjoy coming to your classes and retain more of the information that you present.

KPMG Consulting
Barents Group

Module 4:

Facilitation Skills

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MODULE 4: FACILITATION SKILLS

Facilitation Skills

Overview

Facilitation skills are useful for delivering new content, helping participants have a deeper understanding of content being presented and as a model for communication skill. Often participants gain the most from new information when they have the opportunity to process information or they take an active part in the discovery of new information.

Learning Objectives

Upon the completion of this module, you will be able to:

♦ Describe effective facilitation techniques.

♦ Use facilitation skills to lead training classes effectively.

♦ Use listening, questioning, feedback and summarizing skills when facilitating classes.

♦ Explain how to adapt training to meet the needs of the learners who are in the class you are teaching.

Importance of Facilitation Skills to the Learning Process

Facilitating a training session is different than presenting and it requires additional skills:

- ◆ Effective Communication Skills.

- ◆ Giving Feedback.

- ◆ Adapting Training to Your Audience.

Facilitation has many benefits for the learning process.

Engages the Participants

Participants who are *engaged* in the learning process typically retain more of what they learn. Since the brain processes information so quickly, a participant who is engaged by answering questions that the facilitator asks is able to pay better attention to a class. Engaging participants ensures that they are accountable and active in their own learning process.

Learner Accountability

When participants are accountable for their own learning, they work harder to gain something from the class. Accountability for our learning may be a new idea to some participants who expect the facilitator or instructor to be responsible for making them learn something. The more actively participants participate in a class, the more they retain when the class is over.

Relationships in Classroom

Research indicates that one of the most important aspects of an effective learning environment is strong relationships among participants and a strong relationship between the instructor and each participant. These relationships are strengthened when the instructor asks participant's opinions or gets participants to talk about content.

Instructor Assessment of Understanding

Instructors can measure how well participants understand a topic by asking them questions. Questioning helps the instructor determine whether he/she needs to explain something further or explain it in a different way so that participants understand it better.

Effective Communication Skills

Effective communication skills for facilitation include questioning, listening and summarizing. Inherent in all of these skills are verbal and non-verbal components of communication.

Verbal and Non-Verbal Communication

Dr. Albert Mehravian of UCLA performed a study on verbal communication and discovered that communication is broken down as follows:

- ◆ 55% non-verbal.

- ◆ 38% tone of voice.

- ◆ 7% words.

This study applies verifies the importance and power of non-verbal communication. Often the words a person says may even mask his/her true meaning. Facilitators must be aware of the true messages that they give to participants, and the ***verbal*** and ***nonverbal*** messages that participants give them.

Non-verbal communication carries the same ***importance*** in all cultures; however, the same gesture does not always mean the same thing in all cultures. In fact, within a culture, the same gesture may mean different things from one person to another. However, the ***same gesture*** used by the ***same person*** almost always means the same thing.

For example, when one person crosses his arms in front of his chest, it may mean he is bored with your presentatioin. When another person crosses his arms in front of his chest, it may mean he is cold. So facilitators must pay attention to the gestures of each participant and find out what a disturbing gesture means when that person does it.

Exercise: Non-Verbal Message

*Instructions***:**

1. Record your observations of the facilitator in the space provided.

Non-Verbal Message   *Behavioral Clues*

1. _____

    _____

2. _____

    _____

3. _____

    _____

4. _____

    _____

5. _____

    _____

Questioning Skills

Asking questions appropriately ensures that you help participants learn most effectively. Participants need to feel that your questions are friendly rather than interrogative.

Closed Questions

Closed questions require a one or two word answer. These questions are used to get specific facts or a yes/no answer from the participant. If this type of question is overused, the participants may feel questioned. Closed questions often begin with the words or phrases: *what, are you, do you, have you, who or where.*

Examples:

- What is the answer to #3?

- Are you prepared for the test?

- Do you understand the steps for processing the transaction?

- Have you learned this topic before?

- Who went with you?

- Where, in this diagram, is the back office located?

Open Questions

Open questions encourage participants to give longer and more complete answers. Open questions often begin with the words or phrases: *describe, tell me about, how, what happened or why.*

Examples:

- Describe the situation to me.

- Tell me about the problem.

- How do you perform the task?

- What happened when you used the new procedure?

- Why was the training method effective?

Exercise: Questioning Skills

Instructions:

1. Write some open questions that you might use in a class.

2. Write some closed questions that you might use in a class.

3. The facilitator will ask you to share using your questions with the rest of the class.

Open Questions

_____

_____

_____

_____

_____

_____

_____

Closed Questions

_____

_____

_____

_____

_____

_____

_____

Listening Skills

How well you listen to participants will affect how well you determine whether they understand the content that you present. Effective listening also builds rapport with participants and helps you formulate the next question to ask.

Keys to Effective Listening

♦ Put down other work and concentrate on the participant when listening.

♦ Listen to voice inflection, speed and changes in voice to detect any emotional issues that the participant is dealing with.

♦ Allow the participant to finish speaking before you begin speaking.

♦ Listen to feelings as well as facts.

♦ Frequently summarize what you understood the speaker (participant) to say.

Exercise: Listening Assessment

Instructions:

1. Assess how well you listen by rating yourself on the scale below.

2. Write down some ideas for improving your listening skills.

Listening Activities	Rating Scale				
	Excellent			*Poor*	
I put down other work and concentrate on the participant when listening.	5	4	3	2	1
I listen to voice inflection, speed and changes in voice to detect any emotional issues that the participant is dealing with.	5	4	3	2	1
I allow the participant to finish speaking before I begin speaking.	5	4	3	2	1
I listen to feelings as well as facts.	5	4	3	2	1
I listen for clues of whether or not the participant understands the content.	5	4	3	2	1

Actions to Take to Become a Better Listener

_____

_____

_____

Summarizing

Since much of verbal communication between people is misunderstood, summarizing is a valuable tool for ensuring that you have understood what someone has said. Summarizing is simply stating the main ideas that you have heard a participant say.

Example:

> *"You understand the Foundations of Creditworthiness; however, you need more information about calculating collateral valuation. Is that correct?"*

Exercise: Summarizing

Instructions:

1. For each of the scenarios below, summarize and write down what you might say to the participant.
2. Share your answers with a partner and receive feedback.

Scenario 1

Participant: "I think the most valuable information we will learn is how to communicate with people and encourage them to participate in a class. We will learn not to talk so much and dominate the conversation because participants will get bored if we do that."

Response:

_____

_____

_____

Exercise, continued

Scenario 2

Participant: "In our bank, people don't care how fast they work. They only care whether we get the transaction correct. We need to learn about how to get the transactions right in this class, and I don't think we have covered that subject yet."

Response:

_____

_____

_____

Scenario 3

Participant: "The most important employee in the bank are loan officers. They are the ones that bring in the revenue."

Response:

_____

_____

Giving Feedback

Feedback communicates how the learner is progressing. Positive reinforcement motivates the learner. Feedback can be positive or corrective and should provide clear and specific information concerning performance.

Without feedback the adult learner lacks direction and does not know how well he/she is progressing with the course content. Using the information gained through feedback helps the participant evaluate how well he/she is progressing and determine areas that need increased concentration or practice.

Feedback should be:

- ♦ Immediate.

- ♦ Factual.

- ♦ Specific.

- ♦ Delivered in a positive, non-judgmental manner.

- ♦ Designed to give instruction on how to correct errors.

- ♦ Used to encourage a participant to continue correct performance.

- ♦ Respectful.

Immediate feedback allows the participant to correct misunderstandings before they adversely affect the learning process. When an instructor realizes that a participant has incorrect information, or does not understand the material, he/she should redirect the learner.

Feedback should be presented in a way that moves the student forward. Phrases that indicate the correct answer or way of performing a task are more useful than those that point out the error.

> *"John, the correct answer for number 2 is yield,"* or

> *"John, number 2 is not correct. Where can you find the correct answer?"*

> are better ways to communicate than

> *"John, number 2 is wrong."*

Feedback should be delivered in a positive, non-judgmental manner. The instructor presents facts about performance, not opinions about the person. Judging phrases might be:

> *"You tellers never seem to understand the entire operation."*

> *"I've answered that for you twice already."*

Design feedback in a way that gives instruction on how to correct errors. Tell the participant the correct answer, where to find the correct answer, or have another participant work with the learner. The goal of feedback is to correct and improve learning. Without direction on how to correct errors the learner may not gain the most from a course.

Specifics must be given as a part of feedback. General statements should be avoided.

Communicate to the participant exactly **what** he/she did correctly or incorrectly, **how** it could be improved, **what** was right about it. Specific feedback might sound like:

> *"Joyce, the report you wrote had the correct figures and used the correct format."*

> Non-specific feedback might sound like:

> *"Joyce, the report you wrote was good."*

Adapting Training to Your Audience

Focusing on the needs of your audience when facilitating is one of the keys to your success as a facilitator. You must pay careful attention to what people do and say in the classroom to ensure that you are meeting their needs. Adapting training to your audience may include one of the following:

♦ Spending a little more time on an activity than planned.

♦ Spending less time on a concept if the class already understands it.

♦ Spending more time explaining a difficult concept if participants are having difficulty understanding it.

♦ Providing more short breaks if that works better for participants than fewer and longer breaks.

♦ Meeting the energy level of the audience. For example, if the audience has a very high level of energy, you should project at least that much energy. If the audience shows bordom or lack of interest, you may wish to switch to a method of tracking that requires this active involvement.

Effective Facilitation

Effective facilitators must have the abilities to be effective in the classroom. These abilities are listed below.

- ♦ Understand people and their behavior.

- ♦ Understand group behavior.

- ♦ Work and communicate effectively with people.

- ♦ Present a credible image in front of a group of people.

- ♦ Demonstrate the four basic facilitative functions.

Understand People and Their Behavior

Facilitators must know about human behavior in order to effectively lead class and respond to participants. For example, a facilitator might notice a participant that will not make eye contact with her. The facilitator should note that this person is probably shy and might take some coaxing to participate. Another participant, who is very talkative, might have the tendency to dominate the class. The facilitator should realize that this participant might need to be controlled in how much he/she says, yet allowed to express his/her opinions occassionately.

Understand Group Behavior

Group behavior is affected by the members of a group or class, their relationships to each other and other surrounding factors. Facilitators should gather information, prior to class, about the audience and the relationships among audience members so they are as prepared as possible. Managing the personalities of the people in the group is not always something a facilitator can prepare for. How participants interact with each other is something the facilitator has to observe and work with during the class. Encourage respect among participants by demonstrating that you respect each person and value each person's opions. How specific people in the class interact with each other or how the participants interact with the instructor can set the tone for how the entire group acts, and how much the group gains from the class.

Work and Communicate Effectively with People

Since facilitators must be able to observe behavior and adjust their own actions to manage the people in the class, facilitators must have experience working and communicating with people. For example, if a new facilitator is promoted from a job where he worked on an assembly line in a plant and had no experience interacting and communicating with co-workers, he would need to gain experience interacting and communicating with people in order to be an effective facilitator.

Present a Credible Image in Front of a Group

Facilitators must feel comfortable in front of a group and show confidence. Since the skill of facilitation entails asking questions and eliciting participants' opinions, the facilitator must not give the image that he/she does not know the topic or is fearful of explaining concepts. Some of the techniques for overcoming nervousness, that were described earlier in this course can be used to help a facilitator present a credible image.

Demonstrate Four Basic Facilitative Functions

Four basic facilitative functions include:
- ♦ Emotional Stimulation.
- ♦ Caring.
- ♦ Meaning Attribution.
- ♦ Executive Functions.

Emotional stimulation is how the facilitator is able to elicit emotion from participants to improve their understanding or get them involved in learning.

The skilled facilitator demonstrates caring for the participants which helps motivate them to learn and respond more positively to the facilitator. Caring also encourages participants to take a risk with learning new information. When the facilitator cares for them, they feel less threatened and more willing to volunteer answers in class and participate in class activities.

Meaning attribution is how facilitators create true meaning for concepts. You achieved this by providing examples or relating an activity in the classroom to the participant's job.

Executive function has to do with managing the logistics and activities in the classroom. The facilitator does not act like a dictator; however, he/she is responsible for keeping activities on track and keeping participants focused on the topic being presented.

The grid below describes behaviors associated with these functions:

FUNCTIONS	*Emotional Stimulation*	*Caring*	*Meaning Attribution*	*Executive Function*
BEHAVIORS	Challenging	Accepting	Reflecting	Gatekeeping
	Confronting	Understanding	Interpreting	Setting Standards
	Demonstrating Strong Emotion	Supporting	Explaining	Giving Directions
	Motivating Action	Modeling Warmth	Labeling Ideas or Skills	Blocking Behaviors
	Catalyzing Interaction	Developing Personal Relationships	Linking Concepts	Managing Logistics of Activities

Emotional Stimulation

Challenging	Motivating participant to desire to improve knowledge and skills.
Confronting	Asking direct questions that start participants thinking.
Demonstrating Strong Emotion	Demonstrating scenarios that participants might be involved with; the strong emotion making the scenario realistic.
Motivating Action	Getting participants to participate in case studies, class discussions and activities.
Interacting	Getting participants to discuss ideas with each other and with the facilitator.

Caring

Accepting	Showing participants that their input is valued.
Understanding	Listening, reflecting and summarizing what participants say to show that the facilitator cares and understands how the participants feel and how well they understand the content.
Supporting	Encouraging participants to participate by saying things like, *"That's a helpful response."*
Modeling Warmth	Smiling and indicating a friendly attitude toward participants.
Developing Personal Relationships	Interacting effectively with people by listening and asking them questions.

Meaning Articulation

Reflecting	Repeating what the instructor heard someone say to ensure that the instructor understood the person's message or intent.
Interpreting	Reviewing the facts, conditions of a situation or activity and bringing meaning or a conclusion to the activity.
Explaining	To expound on a concept so that participants understand it better.
Labeling Ideas or Skills	Categorizing information, skill or events that occur in the classroom so that participants can understand a concept better.
Linking Concepts	Connecting one concept to another so that participants can retain the information better.

Executive Function

Gatekeeping	Managing the class so that the instructor remains in control, but the participants have an opportunity to participate.
Setting Standards	Indicating exactly how activities should be executed, for example, participants giving feedback to other participants should describe specific behaviors.
Giving Directions	Explaining to participants how to perform an activity.
Blocking Behaviors	Managing behaviors that are inappropriate or interfere with learning, for example, participants that talk while another participant is talking.
Managing Logistics of Activities	Keeping the class on track with activities, for example, monitoring that activities are completed within the allotted time.

Exercise: How Facilitation Skills Apply in Your Culture

Instructions:

1. Work with your group to complete this exercise.

2. Discuss the questions below.

3. Record your groups' answers in the space provided.

4. Be prepared to present the results of your discussion to the rest of the class.

1. How do you think using facilitation skills will work for groups in your classes?

_____

_____

_____

_____

_____

_____

_____

_____

2. What barriers, if any, do you think participants will have to facilitation-style presentations?

_____

_____

_____

_____

_____

_____

_____

_____

_____

3. What challenges will you have using facilitation skills?

_____

_____

_____

_____

_____

_____

4. How will you overcome your challenges to using facilitation skills?

_____

_____

_____

_____

_____

_____

_____

Exercise: Facilitation Practice

Instructions:

1. Choose one of the topics below for this exercise.

2. Practice facilitating the topic with a partner. (Remember, you are facilitating a discussion and not just presenting information, so involve your partners in the session.)

3. Allow your partner to give you specific feedback when you have completed the exercise.

4. Switch roles while your partner facilitates a session. Give your partner helpful, behavioral feedback about his/her session.

Topics

♦ The Importance of Explaining Concepts Fully.

♦ The Importance of Learner Accountability.

♦ How to Elicit Responses from Participants.

♦ Why Practice is Important for Learning a New Skill.

Evaluation

1. Did you feel like you were being *questioned* by your partner?

_____

_____

_____

2. Did you feel like your partner was interested in what you had to say? Why or why not?

_____

_____

_____

3. Did you ever feel like your partner was not listening? What did you partner do to make you feel like he/she was listening?

_____

_____

_____

4. Did you feel like your partner adapted the facilitation to your needs?

_____

_____

_____

Summary

In this module, you learned about the role of facilitation skills in the success of your training delivery. You learned to:

♦ Effective facilitation techniques.

♦ How to use facilitation skills to lead training classes effectively.

♦ How to use listening, questioning feedback and summarizing skills when facilitating classes.

♦ How to adapt training to meet the needs of the learners who are in the class you are teaching.

As you constantly improve your facilitation skills, participants will benefit from your ability to lead them to a deeper understanding of content. Learners will appreciate your facilitative style because it allows them to feel like they control and participate more in their learning.

Module 5:

Evaluating Training

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MODULE 5: EVALUATING TRAINING

Evaluating Training

Overview

Evaluating training helps session designers improve the training they create and helps instructors assess how well a training session met the learning objectives. The four levels of training evaluation have different purposes. Consistent evaluation of training ensures that you continuously deliver a quality product.

Learning Objectives

Upon the completion of this module, you will be able to:

♦ Describe the importance of evaluating training.

♦ Describe how the evaluation process relates to learning objectives.

♦ Describe the Four Levels of Training Evaluation.

♦ Design level one and level two evaluation forms.

♦ Discuss the importance of level three and level four evaluation methods.

Why Evaluate Training?

Training should be evaluated so you can make improvements and justify that the training is effective and worth trainees' time. Immediately following delivery of a new program, trainers and training designers should meet to evaluate the design, content and presentation of the program. Continuous evaluation ensures that changes are made that will make the training as effective as possible.

Improving training design and delivery based on evaluation enhances your credibility as a trainer. Trainees appreciate the fact that you desire to ensure that training is worth their time and efforts.

How to Evaluate Training?

The key tool for evaluating training is comparing the training results to the learning objectives for the training. Therefore, learning objectives should be written, so the objective is measurable. For example, "Explain the trading process," indicates that the participant understands the trading process since he/she can explain it. When objectives are written this way, trainers and training designers can more easily measure how well the training met its goal.

Four Levels of Training Evaluation

Four levels of training evaluation include:

♦ Level 1: Trainee reactions.

♦ Level 2: Assessment of trainee learning at the end of training (testing).

♦ Level 3: Supervisor's evaluation of trainee's behavior back on the job (perfomance).

♦ Level 4: Results produced from training, for example, increased sales or fewer errors.

Our discussion focuses on levels 1 and 2 since they are easier to measure. Levels 3 and 4 information is more difficult to gather, but the results of those evaluations give better indications about whether the participants have actually learned from the training and achieved the desired results. For example, a participant changes their pre-training trading behavior and produces the desired results of fewer failed trades.

Level 1 Evaluation

Level 1 evaluation should be conducted before participants leave the classroom. When evaluation is conducted immediately, participants are more likely to remember accurately how well the training helped them learn. Key elements that should be included in Level 1 evaluation are listed below.

♦ Asking participants whether training met each of the stated learning objectives.

♦ Asking participants which activities were the most and least effective.

♦ Asking participants how they can apply what they learned to their jobs.

♦ Asking participants to evaluate the course content and materials.

♦ Asking participants to evaluate the performance of the trainer.

A sample Level 1 training evaluation form is on the following page.

Sample of a Level 1 Training Evaluation

Give Us Your Feedback

1. Please rate the content of this course in relation to its importance to your job and in relation to its helpfulness in meeting your needs and expectations.

Module and Topics	Importance to your position						Met your learning needs					
	Below Expectations				Above Expectations		Below Expectations				Above Expectations	
Course: Overview of the Capital Market Industry **Date: December 3 – 7, 2001** **Instructor: Tony Grier**	1	2	3	4	5	6	1	2	3	4	5	6
♦ Explain the basic concepts, principles and advantages of capital markets.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Describe the securities market, the different segments, products offered and return on investment.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Analyze financial statements prepared in accordance with International Accounting Standards.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Apply performance ratios to effectively measure management's performance.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Perform a corporate financial analysis, present your findings and make investment recommendations.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Identify regulatory system and apply regulatory laws to markets in Ghana.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Explain portfolio management and common strategies used to analyze a fund's performance.	1	2	3	4	5	6	1	2	3	4	5	6
♦ Explain portfolio management and common strategies used to analyze a fund's performance.	1	2	3	4	5	6	1	2	3	4	5	6

Level 1 Training Evaluation, continued

		Below Expectations			Above Expectations		
2.	Please rate the instructor's abilities to:						
a.	Encourage group discussion and involvement	1	2	3	4	5	6
b.	Explain concepts clearly and concisely	1	2	3	4	5	6
c.	Relate the module concepts to your position	1	2	3	4	5	6
d.	Have knowledge of the subject	1	2	3	4	5	6
3.	Please rate the course materials and overheads						
a.	Quality	1	2	3	4	5	6
b.	Value to the course	1	2	3	4	5	6
4.	Overall Reaction						
a.	Course	1	2	3	4	5	6
b.	Instructor	1	2	3	4	5	6
c.	Materials	1	2	3	4	5	6

5. Comments and Suggestions (Please use back side of paper if necessary):

Exercise: Creating a Level 1 Evaluation Form

Instructions:

1. Work with your group to complete this exercise.

2. Using the learning objectives for one of the modules in this course, design a Level 1 evaluation form on flipchart paper.

3. Be prepared to share the evaluation with the rest of the class.

Learning Objectives

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

♦ _____

Level 2 Evaluation

Level 2 evaluations evaluate, immediately after training, how much participants learned. In order to determine how much participants have learned, a benchmark should be determined before the training. A benchmark measures how much the participants know or skills they have at the beginning of the training. Then, you can compare what participants know or can do at the end of training to the benchmark level do at the beginning of training.

Methods for Level 2 Evaluation

Methods that can be used for level two evaluation include the following:

♦ Giving the participant tests, to assess their knowledge level, before and after training.

♦ Assessing participants' skill level before and after training.

Tests before and after training should not be so lengthy the test frightens participants. When administering a test before training, ensure you explain the test is intended to evaluate the effectiveness of the ***training*** and will not reflect on the participants' job performance. Ideally, participants should be given the same test at the end of training that they took at the beginning of training. Tests should be easy to grade so, multiple choice, fill-in-blank and short answer questions are the best to use.

Assessing skill can be a little more difficult. The trainer or supervisor needs to observe and assess the level of skill prior to training. This assessment could be conducted on the job or in the class. After training, the participants' skill is assessed again and compared to the pre-training skill level.

Example tests and skill assessments are found on the following pages.

Level 2 Evaluation, Sample Test

Pre-Training Test

True/False Questions: *Answer the following questions either T (True) or F (False). If any part of the question is False, the entire question is False.*

1. _____Principal Trading refers to trading of the brokerage company's inventory of securities.

2._____The Cage Manager has the responsibility for handling securities held at the broker.

3._____The main objectives of the securities regulator is to protect the interest of brokers.

Multiple Choice Questions*: Answer the following questions by circling the best answer.*

4) Functions in brokerage company front office do not include:

   a) Securities Settlement.
   b) Agency Trading.
   c) Corporate Underwriting.
   d) Retail Brokerage Services.

5) Functions in brokerage company back office include:

   a) Research Analysis.
   b) Stock Transfer.
   c) Floor Execution.
   d) Syndications.

6) Principal Trading refers to:

   a) Trading of Clients orders.
   b) Trading the Brokerage company's inventory of securities.
   c) The name of the GSE automated trading system
   d) Trading in an individual broker's personal account.

Level 2 Evaluation, continued

7) Brokers specializing in retail brokerage usually do not have to deal with:

    a) Many Investors.
    b) Variable sophistication and knowladge of investors.
    c) Large institutional accounts.
    d) A wide variety of investment products and services.

8) What does a "proxy department" do?

    a) Manages the flow of dividends from the issuers to the shareholder.
    b) Manages the flow of corporate information between issuers and shareholders.
    c) Records share transfer movements.
    d) Calculates accreud interest income on bonds.

9) The chief compliance officer:

    a) Reports to the president and monitors all operations.
    b) Operates the brokerage company's computer information systems.
    c) Is a NSCG inspector.
    d) Manages the back office client settlements.

10) Nominee holders of securities are:

    a) Clients.
    b) Banks.
    c) GSE on behalf of investors
    d) Banks and Brokerage Companies who hold securities on behalf of clients.

Level 2 Evaluation, Sample Skill Assessment

Loan Collection Observation Sheet

Instructions:

1. **Review** this checklist before observing a loan counselor.

2. **Observe** a loan counselor on two 30-day, two 60-day delinquency calls.

3. **Use** the space provided below to record your observations of the calls.

30 Day Call

☐ Determine the reason for the delinquency.

What the counselor said:

_____

_____

☐ Determine when payment can be expected.

What the counselor said or did:

_____

_____

☐ Determine the correct contact response and reason code from the Collection Description Update Codes.

What the counselor did:

_____

_____

Level 2 Evaluation, continued

☐ If borrower is unable to commit to payment, complete Financial Data Summary-DLQ3 form

What the counselor said and did:

_____

_____

_____

☐ Inform chronic late payer about late fees

What the counselor said:

_____

_____

☐ Document the conversation on the DQL1 screen

What the counselor did:

_____

_____

Level 2 Evaluation, continued

60 Day Call

☐ Determine the reason for the delinquency.

What the counselor said:

_____

_____

☐ Determine when payment can be expected.

What the counselor said or did:

_____

_____

☐ Determine the correct contact response and reason code from the Collection Description Update Codes.

What the counselor did:

_____

_____

☐ If borrower is unable to commit to payment, complete Financial Data Summary-DLQ3 form.

What the counselor said and did:

_____

_____

_____

☐ Inform chronic late payer about late fees.

What the counselor said:

_____

_____

Level 2 Evaluation, continued

Document the conversation on the DQL1 screen.

What the counselor did:

Send the appropriate letters to the borrower.

What the counselor did:

Exercise: Level 2 Evaluation

Instructions:

1. Work with a partner to complete this exercise.

2. Using the Adult Learning Chapter of this course as the subject and content, write a 10-question pre-test on flipchart paper.

3. Choose a specific skill to be assessed.

4. Create a Skill Assessment form for the skill on flipchart paper.

5. Be prepared to share your Test and Skill Assessment forms with the rest of the class.

Level 3 Evaluation

Level 3 evaluations evaluate, a defined period of time after training, the changes in behavior that takes place on the job as a the result of training. This evaluation is much more time consuming and complex than the previous two levels of training evaluation. This level of evaluation is important when you need to determine the ability of a training program to contribute to the development of particular knowledge and skills for identified groups.

Methods for Level 3 Evaluation

Evaluation of the Behavior level usually occurs some period after completion of a training program. Measurement of the Behavior level is conducted by obtaining information from the participants, the participant's manager, or the participant's internal and/or external customers. Information may be obtained from questionnaires, observing the participant perform on the job, or interviews.

Level 4 Evaluation

The Results level of training evaluation is the most difficult level of evaluation. The Results level of evaluation measures how the changes in behavior created by the training have a positive impact on the achievement of goals such as improving the Banking Industry in Ghana. It is difficult to quantify the contribution of training to the business results because other factors may also contribute to the same results.

To evaluate training at the Results level, you must establish a relationship between the training and positive individual, organizational or industry results. Examples of types of measurements include:

♦ Increase in number of loans.

♦ Increase in number of accounts.

♦ Decrease in teller errors.

♦ Decrease in the amount of time to complete certain jobs.

While it difficult to accomplish, the Results level of training evaluation is a very important method to use in justifying the cost of training, demonstrating the value-added contribution of training to the training funding organization and projecting quantifiable results from the training investment.

Methods for Level 4 Evaluation

Measurement of the Results level is conducted by obtaining information from the participants or the participants' managers. To obtain the information, you need to develop and send a survey questionnaire with specific questions.

Generally, two types of information are needed in order to calculate the value of the training to the business in terms of profits and customer satisfaction:

♦ Return-on-Investment or profit, a quantitative measurement.

♦ Anecdotal information (stories of successes as a result of the training), a qualitative measurement.

For the Return-on-Investment data, survey participants asking how much money has been generated or saved as a result of the training. Compare that money to the total cost of the training, including participants' salary and related employment costs. In order to calculate the ratio of ROI, divide the money generated or saved by the cost of training.

Ask participants to estimate how much time they have saved as a result of the training. Extrapolate the average time per participant to all employees who attended the training, and express the result in years.

Ask participants to relate stories of how the training has helped them work better. Compile those stories into categories so you can make general inferences about better investor customer service or better trades, for example.

Measuring the results of training is usually not worth the time and effort to survey participants and compile the results of the survey. However, the investment of time and effort is justified if you need training donor support for the training budget. The data from the survey shows the financial value to the organization or industry and reinforces the importance of training.

If you decide to conduct a Results level training evaluation, ask your training donor what criteria they consider to be the critical business factors related to the training. Ask how they would like you to measure and report the training results.

Exercise: Level 3 and 4 Evaluation

Instructions:

1. You will be assigned to work in a group to complete this exercise.

2. You will be assigned to discuss methods to conduct level 3 and 4 evaluations on a course offered by the National Banking College.

3. List any barriers to conducting level 3 and 4 evaluations and how to overcome them.

4. Have someone in your group collect the core points of the discussion on flipchart paper.

5. Be prepared to share your group's comments with the rest of the class.

Summary

In this module, you learned how and why you should always evaluate training. You learned to:

♦ The importance of evaluating training.

♦ How the evaluation process relates to learning objectives.

♦ The Four Levels of Training Evaluation.

♦ How to design a Level 1 and Level 2 evaluation forms.

♦ The importance of conducting levels three and level four evaluations.

The constant improvement and evaluation of training will add to your credibility as a trainer and help you improve your training sessions. Participants will appreciate knowing that trainers and training designers want to make training as valuable as possible. Participants like knowing that training is worth their time and effort.

Module 6:

Presentation/Facilitation Practice

Table of Contents

Presentation/Facilitation Practice

Exercise

Instructions:

1. Choose one of the topics presented in this course or a topic of your choice.

2. Prepare a five-minute presentation session with an additonal five-minute facilitation session.

3. While you are watching presentations, you will be asked to evaluate your colleagues using the evaluation sheet on the following page.

Evaluation Sheet

1. Please rate the instructor's abilities to: Poor   Outstanding

    a. Encourage group discussion and involvement   1   2   3   4   5   6

    b. Explain concepts clearly and concisely   1   2   3   4   5   6

    c. Relate the module concepts to the participants' instructor job   1   2   3   4   5   6

2. What specific advice would you give the instructor before teaching again?

PRESENTATION AND FACILITATION COURSE EVALUATION

Give Us Your Feedback

1. Please rate the content of this course in relation to its importance to your instructor job and in relation to its helpfulness in meeting your needs and expectations.

LEARNING OBJECTIVE Participants will be able to:	IMPORTANCE TO YOUR INSTRUCTOR JOB						MET YOUR LEARNING NEEDS					
	Not at all			Highly important			Not at all				Totally met	
1. Describe and recognize three learning styles.	1	2	3	4	5	6	1	2	3	4	5	6
2. Incorporate learning style knowledge into training delivery.	1	2	3	4	5	6	1	2	3	4	5	6
3. Describe the principles of adult learning.	1	2	3	4	5	6	1	2	3	4	5	6
4. Recognize the importance of understanding adult learning principles.	1	2	3	4	5	6	1	2	3	4	5	6
5. Incorporate adult learning principle knowledge to maximize training delivery effectiveness.	1	2	3	4	5	6	1	2	3	4	5	6
6. Make effective training presentations.	1	2	3	4	5	6	1	2	3	4	5	6
7. Effectively facilitate training classes.	1	2	3	4	5	6	1	2	3	4	5	6
8. Facilitate group interaction and communication in training classes.	1	2	3	4	5	6	1	2	3	4	5	6
9. Adapt training to the needs of the audience.	1	2	3	4	5	6	1	2	3	4	5	6
10. Evaluate training effectiveness.	1	2	3	4	5	6	1	2	3	4	5	6

		Below Expectations			Above Expectations		

2. Please rate the instructor's abilities to:

    a. Encourage group discussion and involvement   1   2   3   4   5   6

    b. Explain concepts clearly and concisely   1   2   3   4   5   6

    c. Relate the module concepts to your instructor job   1   2   3   4   5   6

    d. Have knowledge of the subject   1   2   3   4   5   6

3. Please rate the course materials and overheads

    a. Participant Materials   1   2   3   4   5   6

    b. Overhead Transparencies   1   2   3   4   5   6

4. Overall Reaction

    a. Course   1   2   3   4   5   6

    b. Instructor   1   2   3   4   5   6

    c. Materials   1   2   3   4   5   6

5. Comments and Suggestions (Please use back side of paper if necessary):